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THE INDUSTRIAL CONFERENCE METHOD APPLIED TO NAVY TRAINING

PAUL L. HOLMES

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THE INDUSTRIAL CONFERENCE METHOD APPLIED TO NAVY TRAINING

A THESIS
SUBMITTED TO THE
SCHOOL OF EDUCATION AND
THE COMMITTEE ON GRADUATE STUDY
OF
LELAND STANFORD JUNIOR UNIVERSITY
IN PARTIAL FULFILLMENT
OF THE REQUIREMENTS
FOR THE DEGREE
OF
MASTER OF ARTS

By
Paul L. Holmes
Lieutenant Commander, U. S. Navy
August, 1949

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SYSTEM USED IN ACKNOWLEDGING SOURCE MATERIALS

In this thesis, written source materials are acknowledged by a citation consisting of at least one number enclosed by parenthesis, for example--(21). This figure refers to the number of the source material as listed alphabetically in the bibliography. When a specific part of the work is cited, an additional number is used to show the page or pages, for example--(21:33). Lecture and interview sources are acknowledged in footnote references.

CHAPTER I

INTRODUCTION

The Problem

The purpose of this thesis has been to study the conference method as used in industry in order to determine whether or not it could be utilized more effectively as a method of training in the United States Navy.

The Scope of the Study

The study has been concerned mainly with the types of situations in industry in which the conference method is commonly used, and with specific techniques which have made its use effective. Quantitative data on the use of the method have been largely eliminated from the study; although it might be interesting to know in how many establishments the conference method is used, such information would be of little value to the Navy. Furthermore, studies of this aspect have not been very satisfactory, because important terms do not have a uniform interpretation.

Need for the Study

Since the end of World War II, the United States Navy has had the problem of training more men than ever before in peacetime. These men vary greatly in age, amount of

education, and types of previous experience. Personnel Administration and Training have assumed more importance. New and different methods have been sought in order to make Navy training more effective; consequently, officers from various branches of the naval service have been placed in selected universities to study and observe methods used in educational institutions and industry.

The conference has been used in the Navy for many years for various purposes such as: planning, evaluation (the critique), administration, and even for recreational group discussions. As a training method, its use has been largely incidental, i.e., training probably resulted in some form whenever it was used, but its primary aspect was operational or problem-solving. A relatively small amount of material has been published to show where and how the conference method of training can be successfully utilized in the Navy.

Definition of Terms

The term "conference" has been used in a loose manner in modern writing. As defined in Webster's Unabridged Dictionary, the conference is "a meeting for consultation, discussion, or an interchange of opinions, whether of individuals or groups." (79:559) "The term, 'method' implies an orderly arrangement, a planned sequence of procedure." (27:77) For the purpose of this study, then, the conference method has been considered to be a basic educational procedure in which

a conclusion is reached as a result of the thinking and discussion of a group of individuals.

The word "technique" has been used in this study to indicate the manner in which some device, called for in the conference method, has been utilized.

"Industry" has been used in an all-inclusive manner, i.e., to include primarily manufacturing concerns, but also other forms of business such as service, communication, and sales organizations.

When used in this study, the term "supervisor" refers to the lower executive level, the link that connects management with the workers. (5:3)

Review of Previous Literature

In the past twenty years, an increasing amount of literature has been written on the various types of group discussion, including the conference method. McBurney and Hance (44), Auer and Ewbank (2), Garland and Phillips (29), and Fansler (24) have written comprehensive texts on the principles of discussion. Cooper (16), Leigh (41), and Hannaford (34) have contributed much helpful information concerning techniques of successful conference leadership. Beckman (5), Parker (54), and Cushman (17) have discussed the subject from the point of view of industrial training. Trade Associations such as the National Foreman's Institute (48) (49), the National Industrial Conference Board (50) (51),

and the American Management Association (61), government agencies such as the U. S. Office of Education, and educational institutions such as the University of Michigan (30) and the California Institute of Technology (10) have coordinated research projects and assembled helpful data.

Although the conference has been used extensively in the Navy for operation planning, evaluation, and other purposes, it has been used relatively little as a training instrument. During the last war conferences were often used in navy yards and other places where large numbers of employees and supervisors were found. Reports of these conferences demonstrate effective use of the method. (58) (59) The techniques and requirements for conducting successful conferences as well as other types of discussion groups are emphasized in a Navy publication, Handbook for the Discussion Leader. (75) MacConnell has discussed briefly the various types of group discussion with emphasis on their use as training methods. (43)

Sources of Data

Two types of data have been considered necessary for this study: (1) the purposes for which the conference method is used in industrial training, and (2) the techniques and devices which have made its use effective.

In gathering the data, four principal sources have been used. First, text and periodical sources were studied not only to provide a background, but also to determine the

extent of current use and the various techniques employed. Second, published reports of actual training conferences, conducted during and since the last war, were examined in order to determine the actual techniques utilized. Third, interviews with experienced conference and training personnel provided information concerning current training programs, their techniques, and applications. Finally, observation of training conferences, in San Francisco business establishments, conducted by the San Francisco City Schools, Division of Vocational Education, provided first-hand acquaintance with the application of previously encountered principles.

CHAPTER II

DESCRIPTION OF THE CONFERENCE METHOD

General Description

Types of Discussion

"The method of discussion is centuries old. One has but to refer to the dialogues of Plato to appreciate how cleverly Socrates trained his understudies in metaphysics by applying the discussion principle." (5:13) In the last two decades discussion has again become a subject of increasing interest. The types of discussion most common today may be considered as the formal and the informal.

The formal types of discussion include the panel, the symposium, the forum, and the debate. "The panel is a device for carrying on informal discussion of problems in a large meeting itself." (24:79) It is an attempt to produce a situation where a small group talks and acts like a committee but with a large audience as a gallery. It is a useful device when the group is so large that all cannot take part in the discussion. The symposium is defined by McBurney and Hance as "a method of discussion in which two or more persons under the direction of a chairman, present in separate speeches the various phases of a problem." (44:299) It is likely to

be most useful when a limited number of speakers, well-qualified and with previous preparation, are presented to give several approaches to a given topic. The formal opening speeches are sometimes followed by a period in which the audience is permitted to ask questions. A symposium is illustrated in Figure 1. MacConnell defines the debate as



FIGURE 1. A SYMPOSIUM

"a regulated discussion of a given proposition between two matched sides as a test of their forensic ability." (43:15) The debate is no longer as popular a method of discussion as it was in former years. On the other hand, the forum is becoming increasingly popular. A forum is illustrated in Figure 2 (p. 8). Fansler describes the forum method as consisting "usually of the presentation of a subject by an expert followed by a question period in which members of the audience ask questions or make brief statements." (24:1) The forum can be used with groups of all sizes, and is well-suited to the presentation of new information.



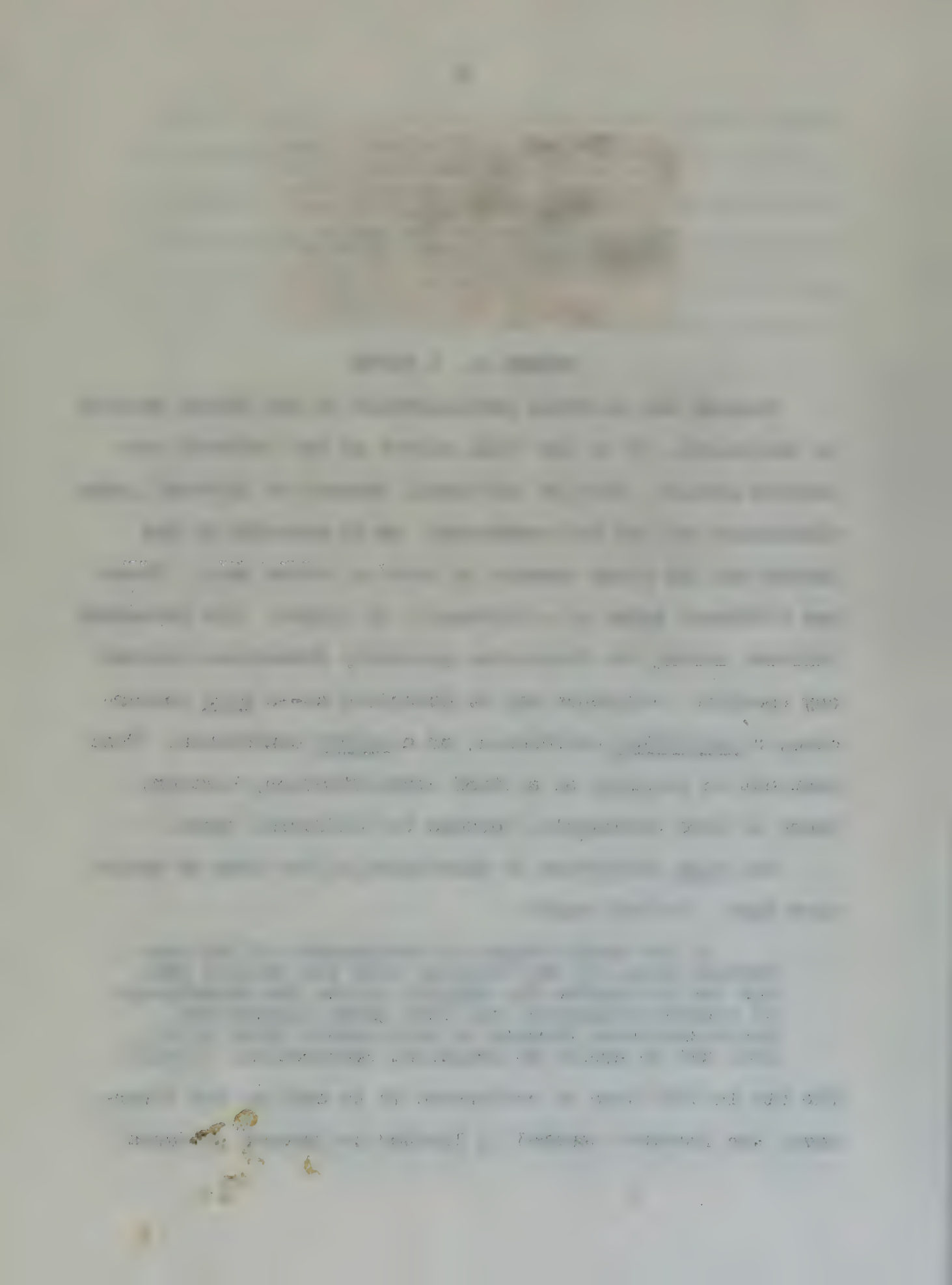
FIGURE 2. A FORUM

Whereas the audience participation in the formal methods is incidental, it is the vital aspect of the informal conference method. When an individual attends an informal group discussion such as the conference, he is expected by the leader and the other members to take an active part. There are different types of conferences, of course. The procedure followed during the discussion generally determines whether any specific conference may be described as--a pure conference, a controlled conference, or a guided conference. This must not be regarded as a fixed classification, however; there is some overlapping between the different types.

The pure conference is also known as the free or excursive type. Hoslett says:

> In the early stages of development of the conference idea, it was believed that the subject matter for discussion lay largely within the experiences of foremen themselves and that group discussions would encourage foremen to think about their problems and to arrive at practical conclusions. (37:88)

The aim in this type of conference is to explore and interpret; the leader's control is limited to general guidance



and summaries. When the problem is stated, the leader is as unaware as any member of the outcome. "Except for a few stimulating questions from the leader, the procedure is left largely up to the group." (65:19) Beckman lists the following main steps:

1. Assembling of experience from the group.
2. Selection of such experience data or facts as function directly on the problem.
3. Evaluation of pertinent data or experience.
4. Conclusion or decision as to the best procedure. (5:14)

Although in this procedure less planning is required of the leader, the conducting of the conference becomes more difficult; the leader does not know "where he is going", and yet must try to guide the discussion and furnish necessary leadership to bring the conference to a successful conclusion. This procedure is likely to be unsuccessful in training unless either the leader, the group, or both are very experienced in the conference method.

The controlled or directed conference is often used today, especially as an operating procedure in business and industry. The leader has some definite objectives in mind for the discussion; he will steer the discussion toward these. Since he directs the thinking of the group to the "proper" decision, it appears that participation is good if it leads to the conclusions or solutions the leader had in mind all the time. (37:89)

While the third type, the guided conference, may appear to be similar to the controlled conference, it differs in an

important way. Again the leader has a specific purpose or objective for the meeting, and he guides the discussion to conform to a standard pattern. However, whereas in the controlled method the decision may appear, and probably is, predetermined, in the guided procedure, only the path, not the substance, is directed. In this way it avoids the criticism of being as "autocratic" or "dictatorial" as the controlled method. This procedure is the most practical for groups which are not experienced in the conference method. If the leader has planned carefully, he should have little difficulty in preventing "side-tracking" of the discussion. For the purpose of this study, the guided procedure has been considered most illustrative of the conference method as now used in industrial training. McBurney and Hance list the main steps in this type of discussion:

1. Defining and delimiting the problem.
2. Analyzing the problem.
3. Suggestions of solutions.
4. Reasoned development of proposed solutions.
5. Verification. (44:10-13)

Uses of the Conference

The conference is widely used in different aspects of contemporary society. In demonstrating that the real work of developing effective legislation is carried out in conferences, Cooper states:

> Now a bill must be threshed out in conferences before it appears before the House or Senate. It is particularly significant that the findings and recommendations of committees carry more weight

> in the final passage or defeat of a measure than does all the impassioned speech-making which may follow its submittal to the lawmaking body for approval or rejection. (16:4)

Beckman points out that "civic groups can effectually come to conclusions through discussion of many community problems of taxation, public improvements, local government, extensions of public services, etc." (5:13)

In education, the formal types of discussion are more common than the informal. Nevertheless, in somewhat modified form, the conference is used as an instructional procedure in adult education programs as well as in the graduate seminar. Of course, as an administrative or supervisory device, the conference is commonly used in schools and colleges.

In business and industry, the conference is used both as an operating tool and as a means of training. The National Industrial Conference Board reports, "The use of conferences as a means of achieving operating objectives and developing personnel has increased rapidly during the past decade, and it is now unusual to find a company without experience with this kind of meeting." (48:3) In actual practice, training is likely to result from many operating conferences, but the primary purpose is to solve problems, to get things done. The conference is most completely utilized as an operating tool in companies where "Multiple Management" is practiced. In one such company (McCormick and Company, Baltimore, Maryland), all phases of operations are handled through the

conference; junior executives such as assistant department heads serve on a "Junior Executive Board", which gets into every phase of management. The two largest divisions of the company, sales and manufacturing, are likewise controlled largely by their respective boards. (45) This extreme form of use of the conference, in which executive decision is delegated to a group, is as yet not very common.

Other industrial concerns have used the conference as a means of communication. Stedman described the procedure at The Servel Company, Evanston, Indiana. Each month top-level executives would meet with their foremen to pass on advance knowledge. The foremen would then lead conferences with their employees as members. Since the employees knew that the foreman was talking directly from management, they felt that they were being kept informed. The company felt that the reduction of absenteeism, waste, wildcat strikes, and grievances was largely the result of this procedure. (70:33) During the war, a large manufacturing company, The Glenn L. Martin Company, Baltimore, Maryland, set up a program of weekly conferences starting with the top-level executives and going through all levels of supervision. In this company, the program was found useful in clarifying doubts and confusion at different levels of supervision.

The second major use of the conference method has been as a training procedure. Here, again, there are variations in different programs. Training is sometimes accomplished

through frequent but not regularly scheduled conferences, usually arranged and conducted for a specific purpose, through institutes which may vary in length and purpose, and finally, through planned and regularly scheduled conference programs.* It is with this last type that this study is primarily concerned. A training conference is illustrated in Figure 3 (p. 14).

History of the Conference Method in Industrial Training

The conference is regarded by certain of its exponents as the oldest method of teaching. Wright and Allen consider that "the so-called Socratic method, as carried out by Socrates, was really a form of conference work, whenever he discussed matters with the group. In fact Plato's Republic was nothing more than a report of an imaginary conference." (84:275) Cooper agrees only in part; he says:

> The conference as a device for getting things done is as modern as the year we live in. The dogmatic dissertation in Socratic dialogue, perhaps the earliest manifestation of conference technique, bears but the faintest resemblance to the streamlined, resultful discussion meeting of today. (16:2)

As a definite, purposeful procedure, the conference method seems to have developed concurrently with foreman training, its primary field of use today. During World War I, with the sudden and impressive expansion of industry,

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* James C. Dunbar, Traveling Instructor, Southern California Training Director's Association, personal interview, January 6, 1949.



FIGURE 3. A TRAINING CONFERENCE

training became highly important. The Federal Board for Vocational Education developed and administered programs for training the productive worker and technician. It was Charles R. Allen, the "father of the conference method", at that time special adviser to the Federal Board, who somewhat "accidentally discovered" the effectiveness of the procedure in training foremen.* In setting up a program at the DuFont Company he found that the foremen were not interested in listening to lectures or reading textbooks. He decided that best results could be secured if the experience of the foremen were utilized as a basis for training; consequently, he set up a series of training conferences.

The conference became increasingly useful as industry expanded and technological changes became more and more numerous. Then, as Dunbar has stated:

> With the passage of the National Labor Relations Act in 1935, the need for training supervisors in business and industry began to be felt. There were . . . . scattered programs throughout the country, but they were few and far between. They mostly consisted of supervisory conferences where problems were discussed or where information was passed down from the chief executive. (20:56)

With increasing federal legislation and the control of business, there was need for training of management personnel.

With the unprecedented expansion of World War II, there was an urgent, desperate need for training, particularly

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* Personal letter by Charles R. Allen to Lawrence Parker, dated May 4, 1928, as quoted in 54:14.

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supervisory training. The Training-Within-Industry Division of the War Manpower Commission devised a series of short training courses which will be described briefly in the following chapter.

Comparison of the Conference Method With Other Training Methods

Three basic educational procedures are used in industrial training: the informational, the instructional, and the conference methods. (18:1-2) All three have their places; none is basically better than the others; each has value under certain conditions. Cushman has stated:

> The efficiency of any instructional method or training procedure can be evaluated in terms of (1) the interest that it arouses and holds, (2) the thinking which it stimulates and encourages, and (3) the activity, mental or physical or both which it requires. (19:139)

One basis for determining which method should be used is that illustrated in Figure 4, i.e., how much old or new information is involved.

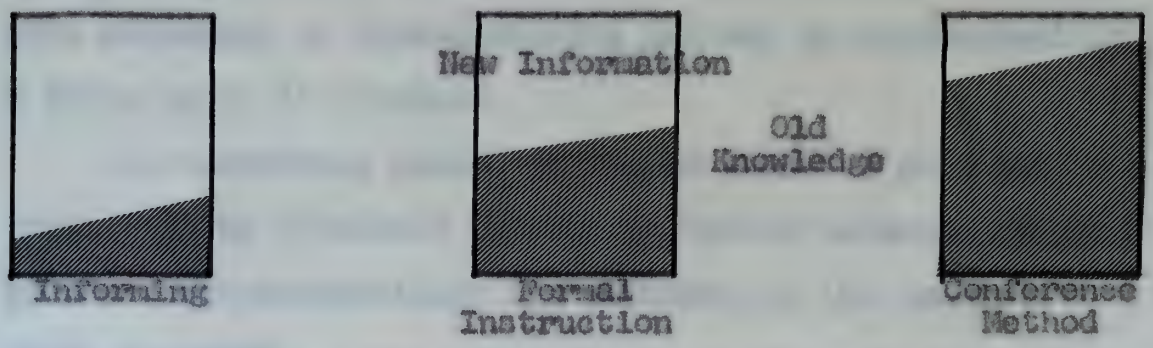


FIGURE 4. THE EXTENT TO WHICH TRAINING METHODS USE OLD KNOWLEDGE OR NEW INFORMATION



The informational procedure is used in the lecture and staff meeting. Its main purpose is to impart information. It is certainly an appropriate procedure when the subject to be considered is outside the knowledge and experience of the group. (16:5) Again, if the group is already well-informed and only a small addition is to be made, the informational procedure may be suitable. In terms of Cushman's criteria for efficiency quoted above, however, the informational procedure would probably rate rather low with many groups unless the leader were exceptionally interesting and mentally stimulating.

In industrial training, the instructional procedure includes the classroom type of instruction and individual coaching. In the classroom method, textbooks and recitation "quizzes" are employed. This type is used relatively little in industrial training. Individual coaching is extremely common and is used largely for training in new skills. While there are advantages which result from personal influence, this procedure is time-consuming and may be impractical if a large group is involved.

The conference method is useful when the principal objective is to stimulate a group to active thinking relative to jobs, responsibilities and problems of its members. Britt suggests:

> When group thinking is found to be superior to individual thinking, it is because of the larger number of approaches to the problem, the suggested

> solutions and the effective criticisms of each proposal, plus the necessity of accepting social criticism and not being "bull-headed." (8:233)

Thus in the conference, the executive can develop the kind of thinking he must use in his daily job, knowing that incorrect judgments will be criticized by other members of the group. Garland and Phillips state:

> Although the method has its recognized limitations, its merits lie in its admitted attempts to secure thinking based upon the experience and knowledge of the group; to stimulate and secure expression of opinions; to secure judgments based on the available facts and opinions. (29:15)

CHAPTER III

THE CONFERENCE IN INDUSTRIAL TRAINING

Executive and Supervisory Training

The conference method in industrial training is most commonly used for the supervisory or foreman level of executive management. Foreman training was begun shortly after World War I, when Louis Ruthenberg of the Dayton Engineering Laboratory Company (DELCO) submitted a question, "What are the ideal qualifications of a good foreman?" to a tremendous list of shop superintendents, manufacturers, psychologists, and educators. The answers to this question became the basis for a rating scale set up by Walter Dill Scott and his staff. The result was a series of conferences largely of the "pure" type described in Chapter II, in which each participant contributed his knowledge and experience to the conference. (70:28-9) The great amount of attention focused on supervisory training has been due primarily to three factors. First, the supervisor is in an important spot--he represents management to the workers, and vice versa. Second, the many changes in employer-employee relations in the past thirty years has increased the necessity for skill in human relationships. Third, it has been realized that the supervisor

must have considerable knowledge about teaching and training workers.

Beckman points out:

> Another aspect of training in supervision, that of training executives of higher rank, is also receiving increased attention. The training of subordinate supervisors has in many instances proved ineffective because of the failure of higher executives to appreciate its objectives." (5:3)

Consequently, in many situations, training programs have been devised to include each operating level from top to bottom. Although higher executive training requires basically the same techniques as that of the lower levels, this study has been primarily concerned with the latter because more work has been done in this area. Ghiselli and Brown state: "This method (the conference) has been substituted almost completely for the lecture method on the lower and executive foremanship levels." (31:356)

Supervisory Training Objectives

Human Relations

The supervisor must know how to handle his subordinates; that is a basic requirement of his job. While he may be accustomed to hearing and dealing with grievances, he may not be using the best methods; on the other hand, he may have had exceptional success with his methods; in either case the discussion of grievances under a competent conference leader may be helpful to the entire group. The conference

method makes possible the pooling of the knowledge of the individual members as a step toward reaching intelligent conclusions. Another requirement for successful management is that the supervisors be able to cooperate with each other. The conference serves this human-relations necessity well in that the individual becomes aware that his is not the only department with "unique" problems. He tends to become more tolerant in his judgment of apparent failures and weaknesses. (48:3) Then too, the friendly, informal atmosphere of the conference tends to carry over into daily routine relationships.

Management Responsibilities

Foremen's unions became very common when industry as a whole neglected foremen; the latter were not kept informed of policy and yet "had to get the work out." To make the foreman feel that he is a part of management, as he really is, the conference has proved a useful device. Beckman has listed seven training objectives in this area:

1. To give the supervisor a more complete conception of his varied responsibilities.
2. To increase the quantity and quality of production, at a lower cost, through a keener appreciation of modern methods of handling labor, materials, and equipment.
3. To acquaint the supervisor with the policies, plans, and ideals of the organization so that he may better interpret them to the workers.
4. To give him a better understanding of the organization in which he is employed, of its operating procedures, and of his relationship to the rest of the structure.

5. To provide him with a broader understanding of the principles of efficient business management and possibly with the fundamentals of business economics.
6. To present the supervisor with operative principles useful in training workers on the job.
7. To prepare him for promotion and greater responsibility within his organization. (5:7)

The Supervisor as a Teacher

It has been estimated that the average foreman spends almost half of his time in issuing instructions and coaching his employees in the correct performance of their jobs. (69:57) Consequently, a successful method of training employees to perform their jobs correctly is necessary. The International Business Machines Company, in setting up a special "university" with voluntary classes for employees found that the best instructors were those who knew their subjects well and were generally considered prominent in their respective fields. However, these individuals usually had to be trained to teach. To accomplish this objective, before each opening term, a teaching conference was utilized to train the instructing staff in fundamentals of teaching. (62: 80-1, 152-4)

Methods Used In Supervisory Training

During World War II and immediately thereafter, much of the supervisory training in industry throughout the country utilized the methods developed by the Training-Within-Industry Division ("T.W.I.") of the War Manpower Commission.

These methods were useful during the emergency period, when much training had to be accomplished in a short time. Even as early as August, 1945, however, Bayly, in a survey of sixty-three companies on the west coast, found that the use of T.W.I. courses was decreasing; he considered this was because the post-war conditions were considerably different from those prevailing when the courses were developed. (4:7) The courses were, however, being used in many cases in modified forms--as parts of broader training programs.

The T.W.I. courses which have been most popular are commonly known as the "J" courses--"JMT" (Job Methods Training), "JRT" (Job Relations Training), and "JIT" (Job Instructor Training). These courses were devised to cover the demands most commonly made upon supervisory personnel, and did meet a definite need during the past war. However, they were highly standardized, abbreviated, and streamlined; consequently, many training specialists felt that the courses lacked sufficient depth, and were not adequate for long-range training needs. Too often the conference leaders were insufficiently experienced in training and were forced to memorize and follow rigid routines and procedures.

Where experienced training personnel have been available, the conference method has been used to greater advantage. In 1942, at the Puget Sound Navy Yard, the training officer, who had many years of previous experience in vocational education, set up a series of training conferences

for supervisors. (59) The purpose was to permit free, open, and frank discussion concerning problems which were slowing down production. Each case was analyzed in such a manner as to define the problem, attempt to determine the cause, and to suggest a remedy. As the war continued, the use of the conference was expanded to include other training aspects such as--training the foremen to become conference leaders and instructors.

In a west coast ship-building company (Seattle-Tacoma), the conference method of supervisory training was introduced to improve efficiency and increase production. (63) The success of this program appears to have been due to three factors: (1) The general manager opened the first meeting--thus adding the prestige of top management, (2) the topics discussed were all at least partly familiar to the group, (3) when remedies were suggested, they were presented to top management for comment, and the top executives took the trouble to consider and answer each suggestion.

The Pratt and Whitney Aviation Corporation, in planning for postwar group leader training set up an extensive program in which four main topics were covered. The first topic, "Technical Knowledge," was included in a shop and lecture program. The other three topics were covered, using the conference method almost exclusively, in a series of seventy conferences. "Application of Leadership Qualities to Improve Production" was covered in eighteen conferences of one and

one-half hours each, in which shop problems were brought up by the leader and members. "Knowledge of Organization" required thirty-six sessions, usually conducted by staff officers. Finally, the general topic of "Supervision," which included--responsibilities, personnel relations, and organization of work, was covered in sixteen conferences. (67:97-9)

The conference method, if it is to be successfully used, requires much preparation. In some companies, the discussion outline is prepared by the training office staff; in others it is prepared jointly by the discussion leader and the training staff. (51:15-23) (30:15-21)

Case studies and actual company problems are commonly used materials in training conferences. Audio-visual aids are often helpful in arousing interest and increasing understanding of the topic. Some companies, however, have found that such aids are not sufficiently specific; at the John B. Stetson Company, for example, these devices were considered so general in character as to be an "insult to foremen's intelligence." (60)

The number of conferences in training programs varies with the type of company. In some cases a program of specified length is used; in others, training is a continuous function, and conferences are a regular part of the working schedule.

Government agencies such as state and local departments of vocational and industrial education have been important

in helping industry to improve the quality of its supervisory training. In some cases these agencies have actually developed and conducted training programs; in others they have provided assistance in the form of advice or training materials.

Conference Topics

Although areas covered by supervisory training conferences vary with different companies, there are certain discussion topics that are common to most programs. While the titles may be worded differently, the topics listed in Figure 5 (p. 27) appear to be used in most supervisory training programs.

A Method for Large Groups

While informal group discussion is generally most satisfactory in fairly small groups, usually including between six and twenty members, a new technique, devised by Phillips at Michigan State College, makes possible its use with much larger groups. The method, called "Discussion 66" because each committee has six members and six minutes to develop questions, is described in Figure 6 (p. 28). Its effective use by a large company in a meeting of some two hundred supervisors is described in the appendix. In this case the lecture-informational method was considered inadequate, and the use of the ordinary conference method would have been impracticable because of the large group.

HUMAN RELATIONS	TRAINING	OPERATIONS
Management--Employee Relations	Employee Training	Responsibilities
Collective Bargaining	Leadership Training	Planning
Grievances	Nature of Learning	Cost Control
Seniority		Waste Control
Work Conditions		Time and Motion Study
Reducing Turnover		Industrial Safety
Building Morale		
Benefit Plans		
Wage Administration		
Merit Rating		
Job Evaluation		
Job Classification		
Employee--Customer Relations		

FIGURE 5. TOPICS COMMONLY USED IN SUPERVISORY TRAINING CONFERENCES

DISCUSSION "66"

A Formula for Total Group
Participation In a Large Conference

Take any problem which affects the welfare of your group and which demands the best thought of every member. Phrase it in a specific question - clear, brief, constructive, and personal - which question you will use when the group is ready. Be sure that it is expressed in the language of your people, and understandable to all.

Divide your group into small committees of equal size with no more than six people in each, meeting right where they are in the assembly room. Ask each circle of six to work as a committee with a chairman to see that every person shares his ideas, and with a secretary to record and report them to the total group.

When you are certain that your members are acquainted with each other in their newly formed committees of six, and have decided on a chairman and secretary -- give them six minutes to discuss the specific question. When the discussion time has elapsed, give each committee a few minutes to screen the ideas - listing the one or two which seem most important for sharing with the total group.

Have each secretary report the findings of his committee to the entire membership as the thinking of six people, screened and summarized for the benefit of all.

The naturalness of the small groups, the element of wholesome competition involved and the informality of the setting will -- with careful leadership -- produce a satisfying democratic result.

Extract from "Getting Total Participation," a bulletin being prepared by J. Donald Phillips, Adult Education Extension Service, Michigan State College, East Lansing, Michigan.

FIGURE 6. DISCUSSION 66

Evaluation of Supervisory Conferences

Training programs for non-supervisory workers can usually be evaluated in terms of fairly apparent improvement in such areas as: level of output, safety records, labor turnover, absenteeism, and learning time. Supervisory training results are not quite so easy to evaluate; the subtle effects which result from changes in attitudes, cooperation, and interests may appear only after several months. In a study including five hundred supervisors and foremen, Greenly and Tussing found that training conferences improved: "Understanding of top-management and its problems and coordination between departments, stimulated thought about company products, and increased knowledge of the job." (33:87) Other studies have demonstrated that supervisory conferences have generally been very effective in accomplishing training objectives. From his experience with the Caterpillar Tractor Company, Connor has concluded:

> We cannot, of course, measure our method's superiority or inferiority in any authoritative manner. For that matter it simply is impossible to apply a yardstick to any foremanship conference work and measure its value in dollars and cents. We know that our program has greatly improved the inter-department smoothness of operations throughout our plants. And we are, therefore, convinced that our plan is proving distinctly profitable to the company as well as to the men. (15:72)

Other Training Uses

Safety Training

Although safety training is considered in foreman and supervisory conferences, it can be effectively handled in conferences for non-supervisory personnel. Cooper has stated:

> When . . . . a corporation decides to give its workmen training in accident prevention, it should be obvious to those who will administer this training that these employees have been avoiding accidents for many years previous to installation of the training program, and therefore already know a considerable amount about this subject from experience. . . . . Theirs is perhaps unorganized knowledge, sketchy and incomplete in spots. But it is extremely valuable knowledge, principally because it is based on experience. Certainly it is quite sufficient background to justify the use of the conference method of instruction. (16:139)

During World War II, the accident frequency rates and accident severity rates accelerated with the rapid increase of personnel employed in industry. Techniques developed for supervisory conferences proved useful for working out accident prevention methods, as well as for making the employees aware of the need for safety and their part in the program. Case studies and audio-visual aids were extremely helpful in arousing interest and increasing understanding in this area.

Sales Training

Conferences have been useful not only in developing customer-contact techniques, but also in training salesmen to use those techniques. Most of the principles of supervisory training in human relations apply equally to the

sales training conference. Both the new and the experienced salesmen are likely to discover or re-discover helpful procedures and techniques.

Non-Supervisory Staff Training

Executives find the conference method useful for training their own non-supervisory staffs. Clerical employees, for example, can be trained in subjects varying from the simple use of the telephone to more complex office policies.

Conference Leader Training

The role of the conference leader will be discussed at length in the following chapter. It need only be said here that whereas the techniques of successful conference leadership have become part of the equipment of higher executives, they have also become useful to the lower supervisory levels and even to the sub-supervisory personnel. Consequently, in some cases the training has been extended to include such individuals.

Trade Union Personnel Training

Progressive trade unions have found the conference method useful in training their personnel. Some union educational directors were initially opposed to the conference; they believed that education consisted only of presenting much information.* When they found that interest was difficult

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* Dr. Van D. Kennedy, Department of Industrial Relations, University of California, personal interview, Mar.17, 1949.

to maintain, and that much of the lecture-presented information was beyond the intelligence of the members, they consented to use of the new method. At least three educational institutions (The University of California, Pennsylvania State College, and The University of Chicago) have developed and used techniques of group discussion to advantage. A difference has been noted, however, in the use of the method with this type of personnel; while in supervisory training, a homogeneous group, in respect to rank and experience, was most suitable, in the union training, this factor has been relatively unimportant.*

One large international union, The United Steelworkers of America, in conjunction with the Union Leadership Training Project of the University of Chicago, has developed and published teaching materials which may be used by union educational directors in local training programs and also by instructors, who teach classes for union members in colleges and universities. There are three main types of teaching materials. First, a handbook, with specific hints and suggestions for conducting effective discussion, is furnished each conference leader. (76) The second type of teaching material is also made available to each instructor: The Instructor's Manual. (77). A sample lesson from this booklet is illustrated in Figure 7 (p. 33). Questions or case

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* Dr. Van D. Kennedy, personal interview, Mar. 17, 1949.

II. THE GRIEVANCE PROCEDURE.

QUESTION

Before we see how to handle grievances, let's see what the purpose of the grievance procedure is.

(a) List below the main purposes of the grievance procedure:

Q2 (1)

(2)

(3)

(4)

PURPOSE OF THE QUESTION

To bring out the purposes of the grievance procedure, why it has been established, and what it is supposed to accomplish.

METHOD

(Suggested time — 10 min.)

If the group does not bring out the 'points' *you might ask:*

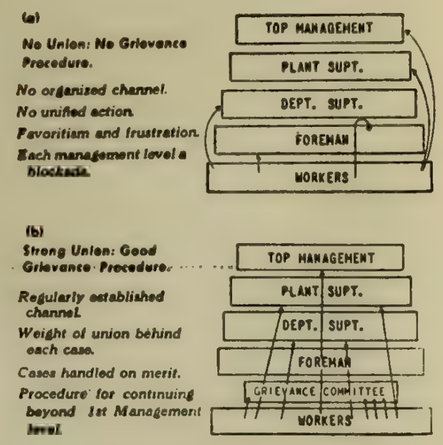
"What would you tell a reporter who was trying to write a newspaper story on union grievance procedure?"

As answers are given, write them on the board.

To hold the discussion to the point, use the diagram, suggested under VISUAL AIDS, to show how worker complaints are handled *with* and *without* a union.

VISUAL AIDS

Chart 2



POINTS FOR DISCUSSION

Some of the correct answers include:

(1) *To protect the worker's democratic rights on the job.*

Before unions were organized, foremen usually had full authority to hire and fire, transfer and discipline their employees. Workers had no appeal from their decisions.

The result was graft and discrimination on the part of some foremen. Top management often knew nothing about this. Through grievance procedure, the worker has an agency by which he can appeal from these decisions and get justice.

(2) *To establish a mechanism for applying the contract.*

Unless there is a means of enforcing it, the union-management agreement itself is useless. Through the grievance procedure the union can make certain that management properly interprets and applies the contract.

(This answer coupled with the preceding one, explains the efforts of unions to establish enforceable laws in industry.

The contract is the constitution and legal foundation; the grievance procedure is the court system for interpreting and enforcing the law. Through the grievance procedure new law is also established by setting precedents. In many industries these precedents, established by grievance cases, are more important than the original code, the contract itself.)

(3) *To provide an organized channel for complaints.*

Without a union, communication in industry is generally from the top down. Orders go down from management; the workers have no way of communicating upwards. Grievance procedures provides an organized channel by which workers can express their complaints and their attitudes toward management practices.

(4) *To give the individual workers the collective support of the union when seeking justice.*

Management itself is organized with each member of management backed by the whole company organization. Individually, the workers have no strength against this organized power. Bound together by the union and the contract, they have the collective support of all workers plus the outside resources of the union.

(SUMMARIZE the Points Made in the Discussion)

II. THE GRIEVANCE PROCEDURE.

Q2

Before we see how to handle grievances let's see what the purpose of the grievance procedure is.

(a) List below the main purposes of the grievance procedure:

(1)

(2)

(3)

(4)

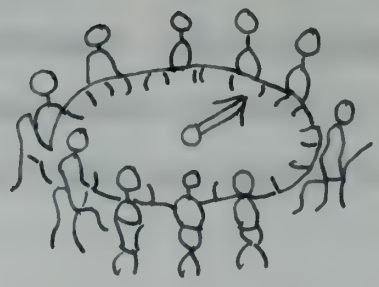
FIGURE 7. SAMPLE LESSON FROM UNION TRAINING MATERIALS--INSTRUCTOR'S MANUAL AND DISCUSSION GUIDE

DISCUSSION NOTES:

problems are based on situations actually faced by union leaders and members. Suggestions on how to handle the particular discussion, visual aids, and information concerning the specific problem are all included. For each topic covered in the Instructor's Manual, the same amount of space is allotted in the Discussion Guide. (78) Each member is given a copy of this notebook. From the illustration in Figure 7 it is apparent that only the problem or discussion-opening question is included in this third type of teaching material. The remaining space is available to the member for making notes of the training conference.

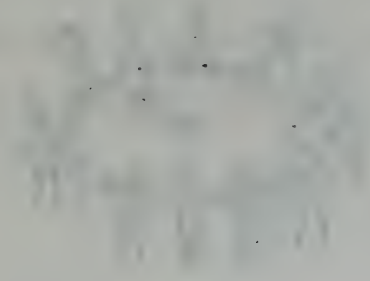
D O Y O U H A V E T H E Q U A L I F I C A T I O N S O F A G O O D L E A D E R ?

D O Y O U K N O W W H A T M A K E S A G R O U P T I C K ?



IF YOU HAVE BEEN DEALING WITH PEOPLE;
IF YOU RESPECT THEM AND THEIR OPINIONS;
IF YOU ARE WILLING TO LISTEN TO THEM;

<u>YOU</u> HAVE THE QUALIFICATIONS FOR A GOOD CONFERENCE LEADER, AND THE SUGGESTIONS AND TECHNIQUES PRESENTED IN THIS CHAPTER CAN HELP YOU TO BECOME AN EFFECTIVE CONFERENCE LEADER



CHAPTER IV

THE ROLE OF THE CONFERENCE LEADER

The role of the leader, the individual upon whom the success of the conference must surely depend will be considered in this chapter. What kind of a person should he be? What knowledge and ability should he possess? What are his responsibilities and duties? This chapter will answer these questions in a way that should provide a guide for would-be conference leaders and those who desire to improve their techniques.

Qualifications--Characteristics That Make For Success

Some writers have made it appear as if the successful conference leader must be some kind of "superman." Barnard, who has contributed much to the study of executive leadership, has stated, "Leadership has been the subject of an extraordinary amount of dogmatically stated nonsense." (3:13)

Character and Personality Equipment

Certain traits or attributes have been generally associated with the term leadership. The successful conference leader either possesses or strives to possess much the same characteristics. Hannaford says, "Conference leadership is based upon and calls for the use of the same qualities

as any other kind of leadership." (34:4) In order to meet the prime requirement for conference leadership, the leader must enjoy working with people, their ideas, and their reactions.

The conference leader must be patient; he will seldom see training progress rapidly; men change their attitudes and opinions very slowly. Whitman says, "Mental growth comes with gradual injection of new truths, of new understanding and of new light into men's minds. One cannot hope to effect a revolution in thought overnight." (81:703) A quality that is obviously a necessary part of the leader's equipment is poise or self-control. The unexpected is almost certain to happen in a training conference. The "best-laid" plans of the leader cannot always be adequate. In such an event, the leader must retain his self-possession, at least outwardly. If he appears upset, he is certain to "lose face" in the sight of the members. A related personality characteristic, tact or diplomacy, is extremely useful in leading conferences. The too-talkative member, the opinionated, stubborn member, and the antagonistic member all must be handled carefully and tactfully. Finally, a sense of humor, a pleasant manner, is helpful in keeping the discussion informal and the group interested. The anecdote, properly used, can reduce tension, and put the group more at ease.

Ability

A leader should be able to think quickly. In a study of student leaders, military officers, and prison leaders, Cowley found that speed of decision and finality of judgment were important distinguishing characteristics. (17:304-13) As this is true for any other leader, it is even more true for the conference leader. Of course, speed is not all-important. A conference leader should be able to think clearly and logically, to diagnose problems and to draw out important points from masses of experience data. The average foreman in industrial training can usually describe his experience, but when he must explain reasons for certain procedures, he has difficulty. The conference leader can help him to understand and explain. Finally, the conference leader must have the ability to get along with others. That is not only basic to his job, but is obvious enough to require no further comment.

Knowledge

The conference leader should know a good deal about discussion methods; they are his working tools. This will be discussed under "Duties and Functions of the Leader."

Some knowledge of the subject is helpful, although thorough knowledge is usually not necessary, and sometimes not even desirable. Some experienced conference leaders assert that the leader needs to know nothing of the subject.

If the leader is extremely well-qualified and expert in discussion methods, this might be true; nevertheless, at least a general knowledge of the subject is likely to prevent embarrassment to the leader. Hannaford has stated this well: "While the leader of training conferences does not need to be an expert in the subject he is teaching, it is well if he had a fair understanding of it. Perhaps it may be said that he should know more of the subject than his group suspects." (34:143)

If the leader knows the group and can talk its language, his chances of success will be enhanced. Techniques of successful discussion may vary depending upon the intelligence, age, or experience of group members.

Some working knowledge of reasoning, evidence, and logic may be helpful to the conference leader. The member who is un-schooled in logic may be prone to use fallacious arguments; these the leader should be able to detect and correct. The leader is the focal point of the group through which its thinking must become more clear.

Attitude Toward the Group

Leadership traits and certain types of knowledge are helpful and often necessary if the conference is to be successful. But, as Zeleny has stated:

> The mere possession of the traits of leadership does not assure leadership. A leader is the center of the social potential of the group. To achieve this position one must share the values

> held by the group. His (the leader's) talents must be used in vital participation in group activity and in redirecting group activity. (85:665)

With respect to the group, the leader should have certain attitudes. He must have a "conviction that the collective wisdom and good judgment of the members are almost always better than the wisdom and judgment of any single member in the group." (52:18) Cooper says: "No man or woman can become a good discussion leader who is not completely convinced that his group, as a whole, knows more about the subject than he does." (16:5) The leader must believe that the group can think its way through a problem and reach a sound conclusion. If this is true, then it must follow that the leader must respect the opinions of the members, and be willing to remain in the background. Finally, the group tends to assume a personality of its own; to this personality, the leader must adjust. He must not expect the group to adjust to his personality.

The Rank of the Leader Relative to the Group

In industrial training, the choice of the leader has been an important problem. Should the leader be of higher rank than the group? This might both increase the prestige of the group and help to get prompt attention to problems discussed by the group. However, the discussion may often be less free and informal, and also the executive may have less time to devote to previous preparation. If someone

of the same rank as the members has the necessary qualifications, and can control the group, he will probably be a good choice for the leader. In such a case the discussion will probably be more free and informal. In some cases, but certainly not all, the selection of a leader from outside the organization may be most satisfactory. While such an individual could probably handle controversial questions better, he would know less about the administration and operation of the plant. Consequently, he must be more skilled in the use of discussion methods. (47:13-14)

The Leader Can Be Trained

The qualities of a successful leader result in part from experience and in part from training and practice. The necessary skills can definitely be acquired; if an individual has the personal qualifications, he can start the process, and gather skill as he uses the method. Eichler has reported experimental evidence that instruction and practice in leadership does produce results. "Although none of Eichler's differences were statistically significant, the fact that all results point in the same direction is sufficient to justify Eichler's conclusion that leadership can be improved by direct instruction." (46:665)

Leigh points out, "Much can be done to train skilled chairmen. The need for them is great. Our schools, which pay so much attention to individual thinking, give little

attention to the development of skill in conducting and participating in a group discussion." (41:85) That leadership is considered important in industrial training is apparent from Bayly's study in which the subject of Leadership was ranked first in importance and was included in courses of more of the companies than any other subject. (4:10) From the material thus far discussed in this chapter, it should appear evident that anyone who has had experience in supervising people should be able to train himself to lead a conference and lead it well. Cooper has concluded, "Good supervisors almost invariably make good conference leaders." (16:15)

Duties and Functions of the Conference Leader

We shall now discuss the duties and functions of the conference leader: what he should do before the conference, the techniques he may find useful in conducting the conference, and his duties after the conference.

Planning the Conference

The type of conference with which this study has been primarily concerned definitely requires previous preparation. While some of the detailed duties may be delegated to someone else for performance, they are, nevertheless, the responsibility of the leader. The most satisfactory results are likely to be obtained when the leader has carefully supervised all the preparations for the conference. The leader

may devise a check-list similar to the one illustrated in Figure 8 (p. 44).

Arranging Mechanical Details

The Physical Setting.--The conference meeting place should be a comfortable, agreeable room. If possible, the room should be at least quiet enough so that the members will not have to shout each time they speak. The physical environment or setting may certainly facilitate or detract from group interaction. LaPiere and Farnsworth have declared:

> Lecturers know something of the importance of an adequate and comfortable auditorium. Actors are keenly aware of the extent to which audience reception may be influenced by the theatre. Business and other executives have elaborate offices partly because these may facilitate conferences with subordinates. (38:295)

This does not mean that a training conference requires the Board of Director's meeting room to be successful. If, however, a comfortable room is provided, the members will be likely to feel that management is interested in their training.

An important, although often overlooked item, is the temperature of the meeting room. If the room is too warm, or poorly ventilated, effective participation in the discussion is not likely to be secured.

The seating arrangement is important in producing a comfortable, informal setting. The National Institute of Social Relations, in its pamphlet, Talk It Over, has stated:

PREPARATION CHECK LIST

HAVE I, AS CONFERENCE LEADER:	Yes	No
1. Decided what objectives should be attained?	___	___
2. Prepared my introductory remarks?	___	___
3. Prepared and studied my discussion outline?	___	___
a. Considered places for quick summaries?	___	___
b. Considered possible group reactions?	___	___
c. Emphasized key points?	___	___
4. Prepared and studied my training aids?	___	___
a. Charts.	___	___
b. Films.	___	___
c. Case studies.	___	___
d. Demonstrations.	___	___
5. Notified members and guest speakers of time and place of meeting?	___	___
6. Checked mechanical requirements?	___	___
a. Blackboard, chart paper.	___	___
b. Seating.	___	___
c. Temperature, ventilation.	___	___
d. Lighting.	___	___
e. Chalk or crayon, erasers, thumb tacks.	___	___

FIGURE 8. SAMPLE PREPARATION CHECK LIST FOR THE CONFERENCE LEADER

> The simple matter of the arrangement of chairs in a room can make or break a meeting. A lecture hall type of seating must be avoided at all costs. Such an arrangement places the leader in a platform or spotlight position--a position not in keeping with his proper role. (53:19)

In Figure 9, certain types of seating arrangements are illustrated. Although the seating will vary with the size of the

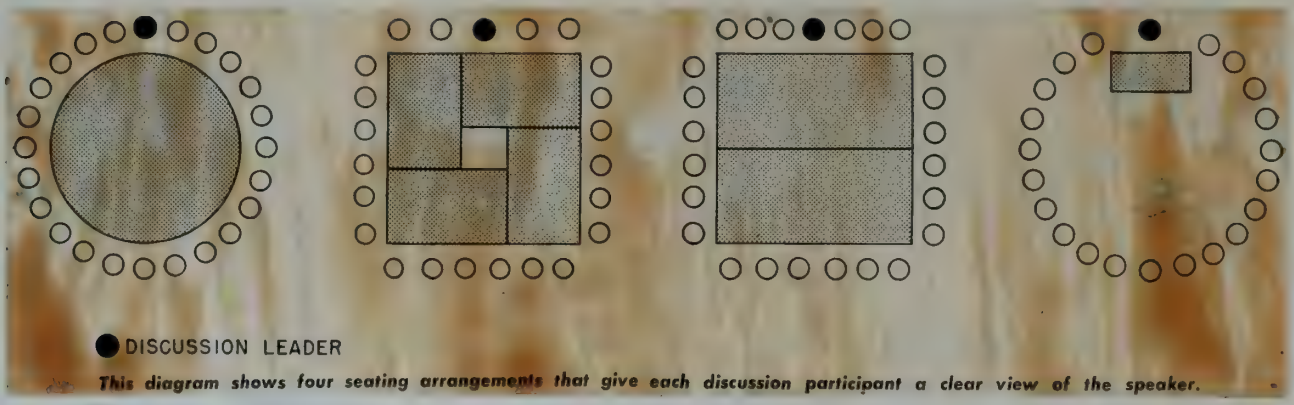
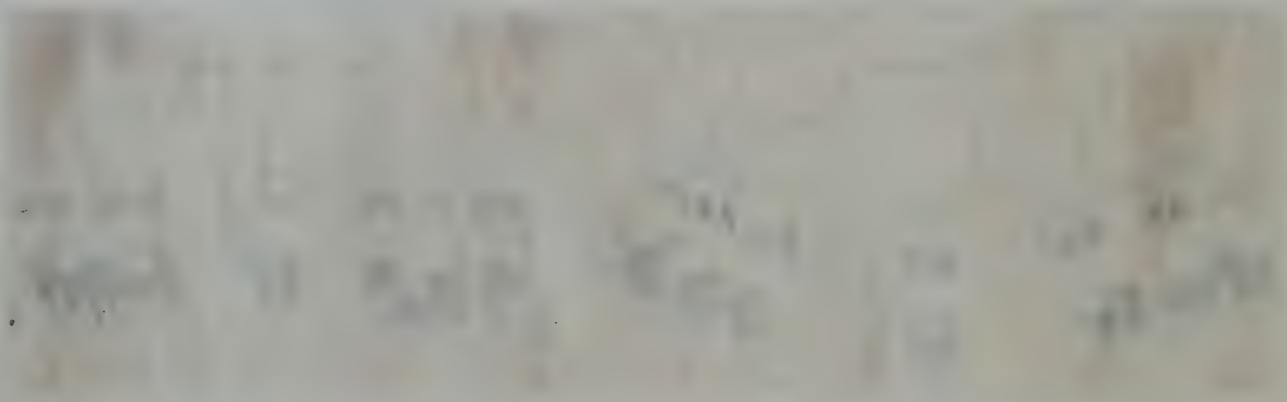


FIGURE 9. DIFFERENT TYPES OF SEATING ARRANGEMENTS

group and the size of the room, two important requirements may be suggested: the members should be able to see one another, and no member should have to face a glaring light.

Starting Time and Duration of Conference.--The success of a conference may very well depend upon the time it is held. In industrial supervisory training, it has generally been found best to hold the conferences during working hours. If this is not done, the conference may interfere with recreation or family life, and consequently, even if he does attend, the member is likely to show less interest in the discussion. A "50-50" plan has been tried, in which the conference would start during the last part of the working day, and continue



for an equal duration on the employee's own time. Although this would seem to be a fair arrangement, it has not worked well, because the supervisor is taken from his department at a most important time of the day--quitting time. If the conference is held during working hours, the member is likely to feel that management is cooperating, and attendance will probably be higher. This makes the conference a part of the plant's regular activities, and so it should be. While certain executives may feel that if their foremen can leave their posts for an hour or two, they do not have enough work, others believe it is a poor foreman who does not have his department organized well enough to leave it for that period of time. (47:25)

How long should a conference last? This, of course, is a question that cannot be answered precisely for all situations. However, most authorities seem to agree that one to one and one-half hours is a most effective length of time. A more general conclusion can be drawn about the duration: the conference should be stopped at the appointed time or sooner, depending upon the amount of group interest. A few ideas well-developed are preferable to many ideas vaguely discussed. Only in unusual cases should the leader consider interest so intense as to warrant extending the period. (21:7)

Training Aids.--If training aids are to be used in the discussion, the leader must insure that all necessary preparations are made so they will be available and ready when

required. Small details such as electric outlets for projectors, chalk and erasers for the blackboard, and thumbtacks for the charts are easily overlooked and may prove embarrassing if not disastrous to the conference.

Publicity.--The leader must insure that members of the group know the time of the conference as well as the meeting place. Sometimes this may involve notifying guest speakers or other personnel not normally considered part of the group.

Preparation for the Discussion

While many writers emphasize the physical setting of the conference to such a degree that it appears all-important, this alone will not make a conference successful. Other essential preparatory factors will be considered in this section.

Selecting and Analyzing the Group.--In many instances, the leader will have little part in determining the membership of the group; when he does, however, he may find certain suggestions helpful. In most cases it appears that a fairly homogeneous group membership is likely to increase the freedom of discussion. An individual of higher rank may hesitate to express himself freely, fearing the group will consider him less intelligent as a result; again, an individual of lower rank may hesitate to express his real opinions before his superior. This is not always the case, however; in the

previous chapter, it was pointed out that homogeneous groups were not necessary for effective labor union discussions. Again, at the Caterpillar Tractor Company, it was found to be unnecessary to have all members on the same level. There was little of either deference or embarrassment in the conferences. (15:172) If non-members will be affected by the outcome of the conference, it is often wise to insure that they are represented. (73:187) It is usually considered that the number of members should be between eight and twenty. In a large group, the shy individual may hesitate to speak; in a very small group, the range of experience may be too limited.

When the members have been selected, the leader should analyze the group. For a well-educated, intelligent group his discussion methods may be considerably different than for a relatively unschooled membership. Even such apparently minor items as the way a leader dresses as compared with the group may make a difference. The extremely well-dressed leader may have trouble getting participation from a group of supervisors wearing "overalls" or dungarees. While this does not mean that the leader must also put on "work-clothes", obviously, it does mean that the leader will take care not to offend the group. The leader's language should not be too remote from that of the group. Again this does not mean the leader may be successful if he uses vulgar language, but he will find that "plain talk" is helpful in any group. (25)

Also, if the leader knows something of the experience of the group, he may at times find the technique, suggested by Hardy, a useful one: "Request certain men before-hand, to make contribution to the discussion if they have ever lived in, or traveled in or done any special work on areas . . . . in any field relating to the topic." (35:25)

Selecting the Topic.--Selecting the topic for discussion may not be the responsibility of the conference leader. In some situations the educational department, the training office, or the operating management may have already decided on the subject. This is especially true when a large number of persons must be trained and standardization and uniformity are necessary. Again, it may be true when a specific situation presents itself--for example, the installation of a new operating process, and the foremen or supervisors must be trained. Even if this is the case, the conference leader's suggestions or opinions are often welcomed. If the selection of the topic is the responsibility of the leader, he has two possible alternatives: making the selection himself, or allowing the group to select its topic, with his assistance.

In selecting the topic for discussion, the leader need not choose a subject in which all the members are experts, but he should insure that the matter to be considered is within the experience of the group. He must consider how practical the subject is, and also the capacity of the group, in both the sense of understanding and of the power or authority to

do something about it. Of course, the interest of the group must be considered; generally, interest is stimulated by the use of difficult subjects more than simple ones. In a different, although closely related field--radio forums--it was found that, "The largest Round Table audience response is to discussions which offer explanations of difficult problems or the exposition of ideas; Round Tables which draw the largest mail are not controversial or debate programs."* Perhaps the most important requirement is that the subject should be limited in scope, because the conference method cannot proceed both rapidly and efficiently.

Preparing Introductory Remarks.--The conference leader's introductory remarks should serve a dual purpose: a brief explanation of the conference procedure, and secondly, an introduction to the topic. If the group is experienced in conferences, the leader may omit the explanation of the procedure; otherwise, certain rules may be stated, such as, for example, remaining seated while speaking, limiting remarks to a certain length of time, and not waiting for formal recognition from the leader before speaking. (52:20) An elementary illustration of the advantage of the conference method may be included in the introductory remarks before inexperienced members: The years of experience of each member may be added to show the total amount (for example, 200 years) that

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* University of Chicago Roundtable Memorandum to Dr. S. T. Donner, 1948. p. 4.

will be pooled in the conference.

In introducing the topic, the leader must remember that the members require a back-ground of information about the topic. If they do not possess this information, the leader's introduction must furnish it. The purpose of the introduction is to state the topic, to define and delimit the area, and to relate the subject to interests of the group. (52:19) The leader may also explain the reason for and the back-ground of the problem, as well as its relation to other problems. In certain instances it may be helpful to have a top-level executive furnish introductory information and then leave the meeting.

The leader may find that certain training aids will be useful as a part of his introduction. Charts, cartoons, news items, pictures, maps, and graphs may help to arouse interest or increase understanding of the topic. Case studies, actual experiences, are likely to broaden the group's experience as well as make discussion more interesting. When various techniques, types of mechanical operations, or types of materials are studied, demonstrations may afford evidence to justify conclusions reached. Short films are often used. The National Foremen's Institute has found that slide films are very effective, especially if accompanied by sound, because they can be held on the screen until the group can absorb the message. While motion pictures, on the other hand, are dramatic, they are expensive, not always sufficiently pertinent

to the subject, and often too rapidly projected to be of real value. (47:57-8) When training aids are employed, they must be discussion aids, not "crutches", or entertainment. Consequently, they do not eliminate the need for introductory remarks by the leader. The length of the introduction will, of course, vary with different groups and different subjects. Generally, however, it should be brief, probably not over ten minutes in length. (81:20)

Preparing the Discussion Outline.--The physical setting, the proper selection of members, and the selection of the topic are important parts of the preparatory process. The well-planned introduction is likewise essential. There is, however, still another step in the process that may mean the success or failure of the conference. In most training conferences, a certain amount of guidance is necessary.

In the guided discussion, the leader must, first of all, have an outline to keep his own thinking on the track. (68:328) Tead has said,

> If conference procedures are sometimes wrecked, it is on this rock most often; namely, because the man who is running the conference has not sat down quietly and planned what it is that he is trying to do, what body of ideas and thoughts he is trying to get more clearly into the minds of his group. (72:185)

Furthermore, if the leader has not prepared himself adequately, he is likely to be more nervous and ill at ease during the conference.

There are various methods of describing the steps in the discussion, but the basis of the methods is essentially the same. The leader, as has been pointed out earlier in this chapter, must state and limit the problem in his introduction. Then the leader and group must analyze the problem to determine the cause. When the cause has been located, solutions can be proposed, and checked for possible effects upon the cause. McBurney and Hance have described the steps which may be followed in the discussion outline:

1. Defining and limiting the problem.
   (What is it exactly we want to do?)
2. Analyzing the problem.
   (What is wrong? What caused the problem?)
3. Possible solutions to the problem.
   (What's your idea? How can we solve the problem? Are there any other solutions?)
4. Reasoned development of the proposed solutions.
   (Which one is best? Which one fits the problem most successfully?)
5. Further verification.
   (Let's try it!). (44:67-9)

In the shipyard conferences described in Chapter III, a three way analysis was used--"Symptoms of trouble--Causes--Treatment". (63) The leader had prepared in advance his own outline on which he had listed various answers. As the conference progressed, he would put the group suggestions on the blackboard under the proper topical heading. There are, of course, other methods of constructing the discussion outline. Perhaps the most general conclusion would be to have a definite, specific subject, and a step-by-step, orderly development toward a conclusion.

Conducting the Conference

If the conference leader has planned well and carefully before the conference, his job will, of course, be much easier during the conference. Nevertheless, the "best-laid" plans seldom include every possible eventuality. In this section, certain techniques, some previously planned, others not, will be discussed. While it may appear that the leader is unnecessary in an experienced discussion group, confusion is likely to result unless there is a leader. The conference leader is most useful in helping to raise important questions and problems and to help the group find answers and solutions. McBurney and Hance have devised the following outline of general functions of the leader during the conference:

1. Get the group acquainted.
2. Get the discussion started.
3. Help all members to contribute their best.
4. Keep the discussion moving and clear.
5. Bring discussion to a satisfying conclusion. (44:126)

The Introduction

One of the most important duties of the leader is that of giving the group a good start for the discussion--particularly by stressing the importance of informality. He should help the members to feel at ease. Certain features previously discussed in this chapter under "Physical Setting" may help the leader in this part of his job. Then, too, a social atmosphere before the conference is actually started may help to set the stage. As the members arrive they should

be introduced to each other and the leader. In many conferences, it has been helpful to have each man, including the leader, write his name and department on a card to be placed before him on the table. As the meeting begins, "the spirit of informality can be carried right into the opening of the discussion by the leader. He can suggest that the members remain seated while speaking and refer to each informally by name. The way in which he introduces the discussion, his choice of words, can keep the spirit of informality alive." (53:19)

The topic of the conference should be printed clearly on the blackboard or chart so that all members may know, from the start, the purpose of the discussion. The leader may then explain his role, and also the rules of the conference--such as speaking only when acknowledged, or if desired by the leader--not waiting for acknowledgment.

Guiding the Discussion

Everyone who has participated in a conference must surely recall instances in which the discussion "got off the track" and appeared to "flounder" around with no direction or purpose. If, in such cases, the leader was capable, he directed the course of the discussion back to the main topic. John Dewey has stated this common difficulty:

> Every participant in group discussions that have anything more than an academic import is aware how prejudices, fixed ideas, reminiscences of interesting personal experiences, sore spots, and

> hypersensitiveness to anything that is interpreted as criticism, balk and deflect the course of thought. (23:xiv)

The leader must try to hold discussion to the main topic of the conference. If it is necessary to introduce new facts during the discussion, the leader must carefully show the relation of the new idea to the topic, and, of course, he must introduce this data only as fast as the group can absorb it. Whitman points out:

> Let the discussion leader remember that men are not naturally endowed with a capacity to think logically. This must be developed. . . . . It is the discussion leader's responsibility to move the subject along in a line of clearly logical development, step by step, and keep the discussion within bounds. (81:703)

Some specific devices to counter-act "side-tracking" may be mentioned. The leader may:

1. Restate the original problem.
2. Ask what the point has to do with the problem.
3. Ask questions to bring the discussion back to the point.
4. Point to the item on the chart without speaking.
5. Secure a statement from a level-headed thinker in order to head off the "rambler".
6. Request the individual members to postpone the side issues until the main point has been settled. (11:35)

Controlling the Discussion

In controlling the discussion, the leader may have more success if he keeps the discussion concrete by asking for specific cases. Interest is likely to decrease if the leader allows philosophizing by the members. If the case study

or case problem is used, it must be with some care, however, not only because anecdotes ("sea-stories") tend to breed more anecdotes, but also because a confusing array of principles may result.

One of the leader's most useful tools is the question. In starting, or reviving discussion, the "overhead" (to the group) question is useful, for example, "How many of you gentlemen have done this work?" Again, the "direct" question, such as, "How long have you been doing this work, Mr. Jones?" may be suitable. When a question is asked of the leader he may well refer it back to the group for answer. This procedure is helpful not only because the leader may not know the answer, or even be expected to know it, but also because participation may be encouraged in this manner. In using the question, the leader may ask for experience, opinion, or fact.

The leader must remember that he is not a teacher--he must not assume an academic manner. He must be willing to remain in the background, to keep his prejudices, opinions, and ideas to himself.

McBurney and Hance have noted that different types of leaders use different methods in controlling the discussion:

1. "Domineering"--the leader controls by issuing orders. ("He will do this")
2. "Laissez-faire"--the leader never makes any suggestions. ("Has anyone anything to say?")
3. "Democratic"--the leader asks thought-provoking questions. ("Shouldn't this point of view be considered?") (44:116)

The aim of the leader should be to secure reflective thinking and not just talk. To achieve this end, he may welcome genuine conflict during the conference. (81:705) He may even start a friendly argument between the members.

To be successful, a conference leader must secure the cooperation and participation of all the members; consequently, he may have to deal with individuals in different ways. If he desires that everyone take part in the discussion, he must encourage the shy, discourage the too-talkative, and tactfully deal with the stubborn, difficult, or contrary member.

Often the shy individual may be the one who needs training the most. This type of person may be aroused at times by a direct question, perhaps one in which the answer is suggested. Then he must be encouraged; his confidence must be increased.

The too-talkative individual should be tactfully curbed. Specific devices which may be helpful are: to make a rule that no one will talk twice until all have expressed themselves; to disregard the talkative member and recognize another person; or to put the individual on the spot if he appears to be bluffing, by asking questions which reveal his weaknesses. If all else fails, the leader must courteously request him to give the other members a chance to express their views.

The difficult or contrary members differ in behavior. If a member appears to be a "know-it-all", the leader may encourage other members to comment on his remarks. If a member wants to argue, the leader must retain his self-possession and may turn him over to the group. If a member is "touchy", the leader may help him, privately, after the conference, to understand that give and take is necessary. In all cases, the leader must retain his self-control, and be patient and courteous.

Occasional summaries are useful in both guiding and controlling the discussion. In making these summaries, the leader may find that the blackboard is very helpful.

The Conclusion

A conference must reach a conclusion, or it is likely to have been a waste of time. This does not mean that a vote of the members is necessary; in fact, in a training conference, such a procedure is generally considered not desirable. A better method is for the conference leader to summarize the discussion, reviewing the "high spots", and emphasizing the points in which the members expressed particular interest. Shellow and Harmon consider, "The conference must end with a product, the whole of which no one member of the group had previously possessed, and useful to all." (65:11)

The leader must conclude the meeting while discussion is still lively; he must not wait until interest has begun

to lag. Hardy says, "A successful discussion is one that is still going strong at the close and is ended with reluctance." (35:27)

Evaluating and Reporting the Conference

Evaluation of the Single Conference

The leader may evaluate the conference in the light of what has been accomplished. Auer and Ewbank list certain criteria of good discussion:

1. Attendance. (May be more meaningful over a longer period.)
2. Nature and extent of participation.
3. Changes of attitude.
4. Individual or group action.
5. Post-meeting conversations.
6. Evidence of increased study. (2:97-100)

To help him in evaluation, the leader may use a questionnaire similar to that in Figure 10 (p. 61). Sheffield has stated, "The ideal outcome of a conference is an agreement which satisfies all the parties to it as giving them what they essentially want, or what they have come to prefer over the things they began by wanting." (23:102) In his evaluation, then, the leader may attempt to learn approximately the degree of satisfied agreement among the members.

Evaluation of a Program of Conferences

Evaluation is necessary so that the institution or business establishment may see what it is getting for its investment in training, and also in order that the program may be

CONFERENCE EVALUATION

Your answers to the following questions are requested, by checking before the appropriate answer.

1. Was the subject interesting to you?

   ___Very ___Mildly ___Not at all.

2. Did you learn something new about the subject?

   ___Some ___Nothing ___Much.

3. Was your understanding of the subject increased?

   ___Not at all ___Much ___Some.

4. Did the leader talk?

   ___Too much ___Not enough ___Just enough.

5. Did you participate in the discussion?

   ___Once ___More than once ___Not at all.

6. Was the conference worth enough to you to be away from your regular work?

7. What comments can you make to improve the conference?

FIGURE 10. SAMPLE CONFERENCE EVALUATION SHEET. Adapted from Auer and Ewbank, (21)

changed as necessary to better accomplish its purpose. The results which an evaluation should bring to light have been discussed in Chapter III.

Reporting the Conference

While the operational conference may have to be carefully transcribed for the use of the executives or other personnel affected by the decisions, the training conference seldom requires such treatment. Cushman says,

> In conferences conducted for the accomplishment of educational or training objectives, it is seldom if ever desirable to keep a detailed record of everything that is said. To do so has a blanketing or dampening effect upon the discussion. It is desirable, however, to summarize the results of conference work, preferably in the form of a condensed descriptive report. (19:45)

The report of the conference may serve a dual purpose: refreshing the minds of the members, and informing top-management of the procedure and results.

Follow-up

When a decision or suggestion has been formulated, in a conference, that may affect the operation or administration of the establishment, the leader should, after reporting the result to top management, attempt to get the management to take the combined viewpoint of the members seriously. If supervisors feel that certain policies are detrimental, top management should review those policies. In the case of the shipbuilding company discussed in Chapter III, this was done with extremely good results. (63)

Training Conference Leaders

Conference leaders are needed, and they can be trained. Now, what are the methods used in training leaders?

In an excellent, although now somewhat obsolete, study of the conference method in trade and industrial education, Parker includes the results of surveys covering various phases of the method. In a study of methods of training leaders, he found that the most experienced conference leaders considered by far the best and most practical method was demonstration by an experienced leader, and practice by the group in training. (36) This is essentially the method suggested by the California Bureau of Trade and Industrial Education in a very complete pamphlet designed to serve as a manual for training conference leaders during World War II. (11) However, the course also included a comprehensive study of such topics as:

1. Selection and arrangement of Conference Room.
2. Analysis of Conference Procedure.
3. Preparation of Conference Problems.
4. Duties and Responsibilities of Conference Leaders.
5. Duties and Responsibilities of Conference Members.
6. Winning the Confidence and Interest of the Group. (11)

These subjects are covered in lectures which precede demonstration conferences. Since the course was designed for rapid wartime training, it was devised to extend over only five sessions of two hours each. This was obviously too short a time to permit thorough training in conference

leading. However, the same course spread over thirty or more hours, as illustrated in one of the training programs conducted by the same bureau in 1947, was highly effective. (13)

For best results in training the conference leader, just as in training personnel in other educational methods, practical experience under qualified supervision is essential in addition to knowledge of procedures and techniques.

The Role of the Member

Although earlier in this chapter, the member has been considered in relation to the leader, his role will now be considered from the viewpoint of his responsibility in the conference as well as his attitude toward the discussion.

Bradford and Lippitt state:

> It is unfortunate that the majority of books and articles on supervision and group leadership have laid almost their entire stress upon the techniques of group leadership and but little emphasis upon understanding the causes of varying degrees of group productivity and morale resulting from different patterns of leadership. By so doing they have failed to underscore for the potential leader or supervisor the cardinal principle that group efficiency must always be a joint responsibility of leader and group and that only through the interactive participation in leadership does such efficient production result. This has resulted in an overemphasis upon dominance and submission whereas the basis of any truly efficient group is joint responsibility, participation, and recognition. (6:13)

Allport points out that when an individual participates actively, he not only learns faster, but he understands and

appreciates the subject more completely. (1:130) Pansler has stated, "Regardless of the amount and correctness of the information upon which a person forms his conclusions, he cannot know what his conclusions are until he attempts to express them." (24:60) This discussion has not been intended to convey the idea that the member who does little talking learns nothing. On the contrary, Hardy has said:

> Provocative discussion should stimulate the thought of every member of the group. As the leader is presenting the topic, an interested group member will be throwing all that is said against his own knowledge, experience, beliefs, and principles; currently he will be accepting or rejecting, and conforming with or opposing what is said. He may be hearing new ideas which he is adding to his own existing information. The listener's thoughts may be racing ahead of or training those of the speaker. A member of the group need not talk to be participating. The physical evidence of attention is some evidence of participation. (35:27)

Since the conference is called for a specific purpose--solving a problem, and the members generally have in their experience the knowledge necessary to solve the problem, it may be considered that the individual member does have a responsibility: he should contribute from his experience to the discussion. Specifically, the member should be willing to talk when he has something to contribute, he should tolerate other points of view, and, he should avoid "showing off" and arguing unnecessarily. Only in cooperating willingly, can the member contribute to the success of the conference. Then, as illustrated in Figure 11 (p. 66), the

meeting will be not one of question and answer only, but one of genuine participating discussion.

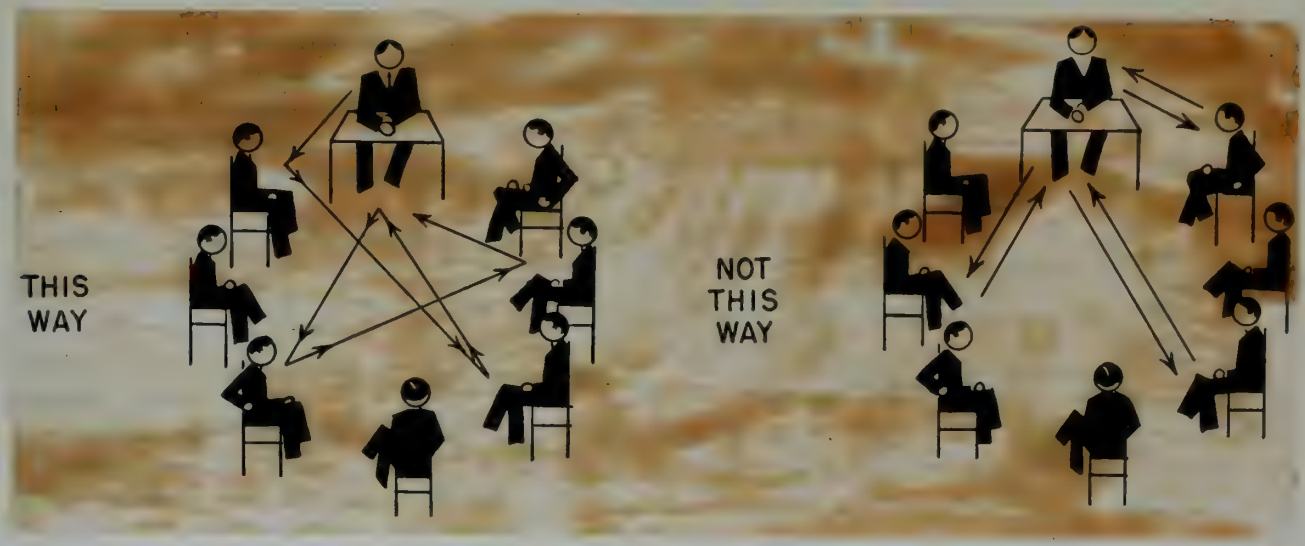
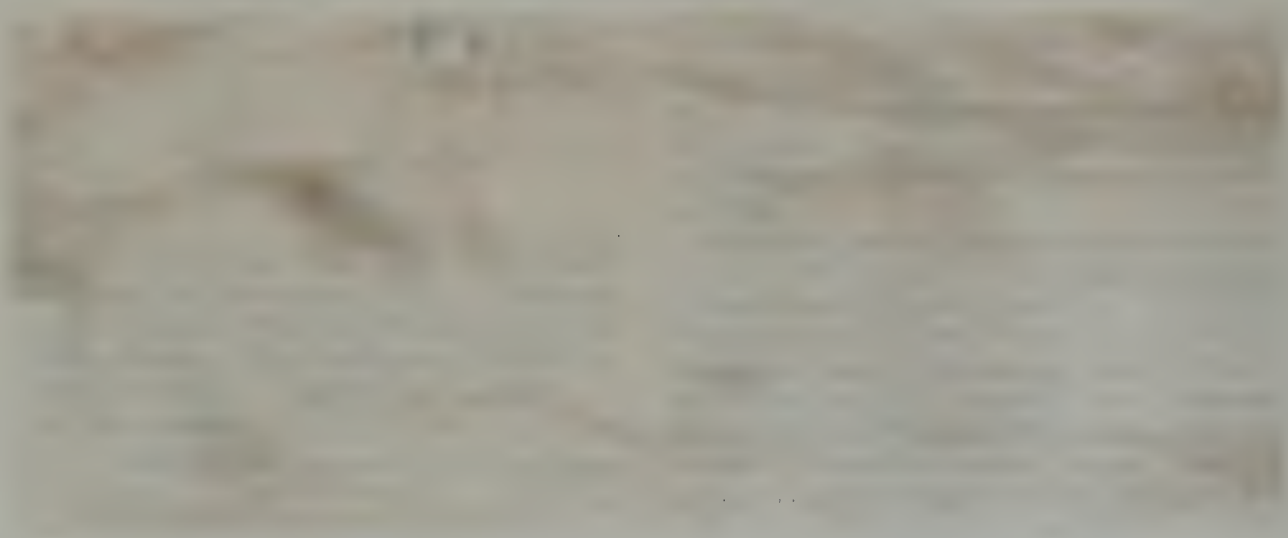


FIGURE 11. ARE YOU CONDUCTING YOUR CONFERENCES PROPERLY?



CHAPTER V

THE CONFERENCE METHOD--ITS USE IN THE NAVY

In previous chapters industrial training practices have been discussed, with decided emphasis on the areas in which the conference method has proved successful. The types of training, including specific subjects suitable for this method, the variations developed to make the method more adequate for specific training needs, and some of the types of personnel that can be trained in this manner, all have been considered. Following this, a chapter was devoted to a consideration of specific conference leader techniques developed over a period of years in industrial training.

The conference method, as it has been described in this thesis, is based upon psychologically sound principles of instruction and learning. The method tends to produce a high level of cooperation and morale among members of the group. Understanding and comprehension are increased since training is based upon previous knowledge and experience. Since no completely "cut-and-dried" schedule is maintained, the interest, knowledge, and enthusiasm of the trainees are utilized to a very great extent. Furthermore, the method has been used with pronounced success in many areas of

industrial training. It may be assumed that the same procedure will probably be successful in comparable Naval training situations. Since, however, a generalization that attempts to cover all possible situations is of little value, the best procedure is to consider specific Naval training situations and determine to what extent they are similar to specific industrial situations.

It is the purpose of this chapter to point out training situations in the Navy where the conference method might prove to be a useful device. It has been recognized that in some cases the method is already being employed; furthermore, because of local variations in training programs, certain recommendations cannot be adopted. Only a few of many situations may be discussed, of course. It is beyond the scope of this study to list all or even most of the specific subjects that may be suitable for this type of training. Even if such a task were possible, its usefulness in a changing military establishment is questionable.

Although this study has been concerned primarily with the conference as a training device, it must not be overlooked that the basic principles may be applied and used effectively in many other types of administrative and operational discussions.

In this chapter, naval activities have been arbitrarily considered in two categories: Training and Operating

activities. This division has been based primarily on the difference in organization and mission and does not overlook the fact that training is an important function of all naval activities, especially in time of peace. The term, Training Activities, includes all Naval schools, whether they are under Bureau or fleet control, and whether they are set up for individual or team-training. Operational training has been included in this category. Operating Activities includes those parts of the Navy in which training may be of importance as it helps to achieve, maintain, or improve operating efficiency as a military unit.

Training Activities

At least three important uses may be considered for the conference method in a Navy school: as an administrative or management device, as a supervisory procedure, and as an instructional method.

The Conference in School Management

The school administrator, just as any other executive, may find the conference a useful operating tool. He may find the experience of his staff useful in the formulation of local policies. The administrator may also find the conference useful in various other management phases of the daily operation of the school. Figure 12 (p. 70) illustrates the use of the management conference by a school administrator.



FIGURE 12. THE SCHOOL ADMINISTRATOR DISCUSSES MANAGEMENT PROBLEMS WITH HIS STAFF

In-Service Training

While school management may require much of the administrator's time, Fox, Bish, and Ruffner emphasize that it must not be considered an end in itself. A most important part of the administrator's duties is supervision, which the same authors have defined as "the improvement of the total school staff through learning." (27:9) They further define in-service training as that "part of the total supervisory program which is concerned with the growth of the members of the school staff in the ability to carry out specific, immediate duties and responsibilities which are assigned to them." (27:140)

In-service training thus includes training of such staff members as clerical workers and teachers. In the case of teachers, in-service training is designed mainly to help them solve specific teaching problems.



In Parker's study, it is apparent that even as early as 1929, the conference method was used extensively for in-service teacher training in vocational and industrial education. (56:50) In previous chapters it has been indicated that the conference method should be used only when the members have some experience with, or previous knowledge of the subject. If actual, specific, practical problems, common to all members of the staff are used, the conference method may be an especially useful one. (27:154) The use of the conference method for instructor training is illustrated in Figure 13. Some specific problems, cited by Fox, Bish, and Ruffner, may serve as examples:



FIGURE 13. INSTRUCTOR TRAINING CLASS AT THE SAN DIEGO SERVICE SCHOOL COMMAND BREAKS DOWN IN SMALL GROUPS TO DISCUSS LOCAL INSTRUCTIONAL PROBLEMS



> What specific induction training is most suitable for the new teacher?
> How can supervisory personnel work more closely with teachers?
> What practical procedures are needed to reduce failures of students?
> How can the success of school graduates be evaluated? (27:156)

It is apparent that these problems meet requirements for conference discussion. Overstreet and Overstreet, after an intensive study of adult education, concluded that,

> Adult educators who attend conferences as part of their in-service training are not callow youngsters who must be told all the steps involved in teaching or administration. They have already learned by the very necessities and precariousnesses of their work, to keep their eyes and minds open for suggestions that may help them solve problems. (54:150)

Even the inexperienced instructor in a Navy school may learn much about teaching from well-planned, coordinated conferences. The psychologists, Ghiselli and Brown have stated.

> The conference is the most successful method in use for training in the non-technical types of problems. When problems of policy, methodology, and technique are to be solved, the conference method proves best. (31:361)

Thomson has pointed out that various departments of the U. S. Naval Academy hold regular conferences for the instructing staff. A major part of these conferences is devoted to a discussion of staff problems.*

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* Earl W. Thomson, Senior Professor, U. S. Naval Academy, lecture, Stanford University, April 14, 1949.

The Conference Method as a Teaching Device

Since the use of the conference method assumes that not only the leader but each member of the discussion group has something important to contribute, it might appear that the conference can seldom be used as a teaching device. However, as Cooper has stated:

> Actually this is far from true, as has been repeatedly proved in schools, in colleges, and in training employees in industrial and commercial organizations. Particularly where the students are adults, and the instruction deals with the work in which they are engaged, it has been demonstrated again and again, in results obtained, the conference method of teaching is superior to the lecture method. (16:6)

At no time throughout this study has it been assumed that the conference method is the best all-around teaching device. It has not been the purpose of this study to discredit other recognized and proven methods; in some areas, the conference method may be distinctly inferior to the lecture or classroom instruction methods. For the dissemination of factual or technical information, other methods may be more efficient. Two important reasons for this condition are that the conference is admittedly slow and cumbersome when much information must be presented, and also that in such types of courses, the instructor alone, and not the group, knows the subject sufficiently well. Thus subjects like mathematics (algebra, trigonometry, calculus, etc.), chemistry, and various engineering courses would be hardly adaptable to the conference method.

On the other hand, certain types of subjects, generally presented in lectures, might be better taught in conferences. It was pointed out that foremen, in industrial training, were not accustomed to sitting intently and listening for long periods of time to speakers. The lecture often can be effective only if the speaker does not talk too rapidly or "over the heads" of the trainees, and does make a determined attempt to arouse interest. (31:355) Such subjects as Leadership, Administration, and Organization may be presented in a more interesting and effective manner by the discussion or conference method than in a straight lecture. Some of the important factors that may determine whether the conference method should be employed are: the kind and number of personnel in the class, their experience and previous knowledge, the content of the course, and finally, the amount of time available for the course. A class, being taught by the conference method is illustrated in Figure 14 (p. 75).

At this point it may appear as if the instructor must choose either the conference method or one of several other methods for his presentation. However, the experienced instructor uses combinations of several methods, or parts of several methods in his instruction. Shields has pointed out, "Naval Academy faculty members employ all college methods of instruction--lecture, discussion, recitation, drill, demonstration, etc.--and many combinations of them." (66:340)



FIGURE 14. A CLASS AT THE INSTRUCTOR TRAINING COURSE, SERVICE SCHOOL COMMAND, SAN DIEGO, CALIFORNIA

Thus, even if a course does not appear to be suitable for the conference method exclusively, it should not be assumed that discussion is ruled out. At the U. S. Naval Academy, Shields has stated:

> Administrative policy encourages very specifically, for example, the continual cultivation of excellence in oral and written expression in all courses of the curriculum. This means not only English, history, economics, and government instructors must make a sustained effort to improve the students' ability to express themselves, but that teachers of chemistry, physics, mathematics, foreign languages, and all the rest should do likewise. (66:338)

Problem-Solving

The problem-solving type of learning is receiving much emphasis in education today. "Essentially in this activity,



the teacher presents or helps the class to develop, a problem which is of interest to all members of the class. The problem should be such that the class can arrive at some satisfactory solution to it or to parts of it." (27:79) A further requirement may be suggested--the problem should be one in which much knowledge of the subject matter is known collectively, and yet little is known individually. It was pointed out in Chapter III that problem-solving is characteristic of both the business operating conference and the industrial training conference. Although this procedure may be used in other methods than the conference, there is experimental evidence that group thinking is more effective than individual thinking in solving complex problems. In reporting these results, Shaw concluded that the reason appeared to be--the rejecting of incorrect suggestions and the checking of errors within the group. (64:504) The use of actual, plausible problems or cases can be of further help in the training program; if the trainees are allowed to participate in some ego-involving way, such as the informal group discussion, learning may be more permanent than if only passive attention has been required. Ghiselli and Brown have observed, "When the problem involves a specific local condition, this method offers a higher guarantee of reaching a successful solution than if only one person does all the thinking, as is so frequently the case in the lecture period." (31:356)

In a series of lecture-panel discussions at the U. S. Naval Academy, Shields observed:

> In the realm of thinking it was generally conceded that reflective thinking occurs only when the student feels that he has a problem to solve. This does not mean just the problem of making a passing mark, or the problem of memorizing the course. Applied to teaching, it means that the instructor must use every possible device or method to get the student to see problems and want to solve them. In other words, reflective thought results from stimulation of interest. A student may consider a course "practical" or impractical on no other basis than the success or failure of the instructor to interest him in solving its problems. (66:337)

Personnel

The types of personnel which may be trained by the conference method, when used as a teaching device, cannot be authoritatively defined. It has been most widely used in industry in training supervisory personnel and higher executive personnel. In the Navy, therefore, not only commissioned officers, but also petty officers would appear to be logical choices--the similarity in executive functions of these two areas of civilian and military life indicates that similar training methods may be applicable. But it has been pointed out in Chapter III that the conference method of training has also been successfully utilized in training non-supervisory personnel in various areas, for example, safety and office procedures. There appears to be no reason why the conference method should not be utilized as a teaching device for non-rated personnel also, just as long as the

subject is one in which the members have some knowledge or experience. In certain vocational schools, the conference method has been used with success in developing effective thinking habits in adolescents.

Special Procedures for Large Classes

When a class is so large that effective discussion of the conference variety appears impossible, there are procedures which may be employed. The first, the "Discussion 66" method has been discussed in Chapter III. Another was devised by Helen Potter at Seton Hill College in Pennsylvania. In this procedure, a large class was broken down into small (approximately five men) discussion groups. Each small group met for ten hours and then prepared a formal round table session, which was held before the instructor as a final check. (57:380) This procedure may be useful in transforming a large, unwieldy class into several small conference or seminar groups, in which the instructor is able to observe the student more readily.

One full summer session at the University of California was devoted to an experimental use of group discussion as a teaching method. No lectures were given; all instructors used discussion methods. Wilkinson, in reporting the excellent results of the session, has considered the reasons to be: "We all represented one general level of background and ability. And we were all concerned with the same fundamental problems." (82:71)

Operational Training

Operational training is a term applied to the process of training personnel for a specific ship or type of ship or aircraft. The percentage of personnel with previous naval experience will, of course, vary, depending upon many factors. If the ship's company is being formed for a specific vessel, to which all trainees in the same unit will be assigned, there will undoubtedly be certain personnel with previous experience in the same type or related types of ships. These individuals might be utilized as a nucleus for a discussion program of training. Whether the conference method would be applicable, however, might depend considerably on the time factor. If the program is an accelerated one to meet a deadline, the conference might be too slow a procedure for general training use. If, however, sufficient time is anticipated, the conference method with its inherent thoroughness, might well prove a useful device for solving problems encountered in the training, or in generally broadening the experience of the crew.

Operating Activities

The conference has been utilized, sometimes effectively, sometimes not, in training personnel of operating units and activities.

Training of civilian personnel in various naval establishments has been accomplished with considerable use of

conference methods. The training has covered areas similar to those discussed in Chapter II as common to industrial training, for example, supervisory training, safety training, and teacher training. As was the case in industry, the method became a common tool during World War II, and has been continued in use since the war in some cases. The availability of trained civilian conference leaders was probably an important factor in establishing these programs.

Another situation, however, described by Whitman as common in the Army, has its parallel in the Navy:

> Too many men have experienced participation in a "discussion", only to leave with a sense of futility and waste of time. They saw no cohesion, they did not understand what was being talked about, they could not follow the tangents which the discussion evoked, and they saw no final focus for the time they spent in the meeting. Such failures can in every case be attributed to the ineptitude of the discussion leader, or most frequently to the fact that he did not understand the principles and practices, amounting to rules, which must be followed in conduct of effective discussion. (81:700)

Non-Commissioned Personnel Training

While it is not within the scope of this study to suggest specific training courses for the many different types of operating units and activities, certain of the uses in industry appear to be applicable in the in-service training programs of enlisted personnel.

Operating policies may become more clear to the men if discussed informally. Whitman found that group discussions of non-commissioned personnel in the Army helped the men to

understand policies in the formulation of which they could not share. (81:705)

The conference is a useful device in training men to instruct, as was demonstrated by the widespread use of the Job Instructor Training programs, discussed in Chapter III, during World War II. Just as the supervisor and foreman must be a teacher, so the petty officer should have the ability to pass knowledge along to others. In a training conference conducted at the Naval Air Station, Alameda, California for the crew chiefs of Squadron VR-2, the discussion included as major topics--four steps in learning: "Introduction", "Presentation", "Application", and "Test". These subjects were presented in such a manner as to make the previous experience of the chief petty officers a basis for further instruction. (12:10-12)

The petty officer may be taught leadership--how to handle men effectively--in the conference. Just as the foreman or supervisor in industry, the petty officer should know how to handle men so they will function in cooperative effort. With the better-educated men in the modern Navy, it is more important than ever that the petty officer be trained in human relations. In the Conference discussed in the preceding paragraph, certain specific questions in this area were used as topic subjects, "How can we determine for what work the new man has the greatest aptitude?" or "What can we do to keep the man satisfied on his present job?" Other topics

have been discussed in Chapter III. In leadership training, the problem-solving procedure is especially useful in making the training realistic.

The petty officer, in the conference, may be given a more complete picture of his varied responsibilities, as well as his relationship to the entire structure. This would include the organization and administration of the unit. Specifically, such subjects as, "How to improve cooperation with the department head," might be considered in this area. Of course, as mentioned in Chapter III, the very procedure of the conference tends to improve subsequent relations among the group members.

If the conference method is to be useful in training it is necessary that the leader be qualified to do a good job. The leader's responsibilities and duties have been discussed in Chapter IV. In this connection, Whitman, after an Army study, observed: "The arbitrary selection of the leaders and the arbitrary grouping of the men, are in no way serious obstacles to the success of the discussion method." (81:700)

Commissioned Officer Training

Many of the principles or conclusions discussed as applicable to petty officers may be applied to the in-service training of officers in operating activities.

"How to Teach", "Knowledge of Handling Equipment", "Knowledge of Organization and Administration", and "Training

in Human Relationships", are only some of the areas which may be covered. There is always a possibility that the officer may be so busy in his own department that he tends to lose contact with other departments of his ship or station. This situation has been described in Chapter III as most common among supervisors in industry. In some cases the officer may be rotated from one job to another; this cannot always be done, however. Knowledge of other departments may be limited to informal disorganized wardroom discussion. When this is the case, and it is desired to broaden executive experience of the officers, planned, guided conferences may be of definite help. Specific phases of training that may be covered in conferences include: giving officers a broader perspective over the purposes and functions of the unit organization as well as the over-all organization; clarifying the responsibilities and functions of various departments and divisions; improving inter-divisional and inter-departmental relations; and uniform interpretation of policies throughout the organization.

CHAPTER VI

SUMMARY AND CONCLUSIONS

The purpose of this thesis has been to study the conference method as used in industry in order to determine whether it can be utilized more effectively as a method of training in the United States Navy.

The conference method was defined as a basic educational procedure in which a conclusion is reached as a result of the thinking and discussion of a group of individuals. Although principles of discussion were used in the days of Plato and Aristotle, the conference method as a streamlined, purposeful procedure is a product of this century. While the method has been utilized with much success in industrial training since World War I, it has only slowly been taking its place in Navy training.

In examining the use of the conference method in industrial training, two main approaches were followed: the various training situations, including the purposes, the types of industries, the types of personnel, and the subjects covered, were discussed; then the techniques, developed in industrial training, which have made the conference method successful, were considered.

The conference, as an informal group discussion, may be distinguished from such more formal types as the panel, the debate, the symposium, and the forum. There are different types of conferences also; the guided discussion without a pre-planned conclusion has been found most generally suitable for industrial training.

The conference method is not necessarily the best procedure for all types of training. Other methods, such as the classroom instruction, and the lecture, may be more satisfactory when only the instructor has much knowledge of the subject matter. The conference is most useful when the group knows something about the subject.

The conference method has found its greatest use in foreman and supervisory training. Three major objectives have characterized foreman-training programs: Training in Human Relations, Training in Management Methods and Responsibilities, and Training in Methods of Teaching. The number of conferences, the type of subjects discussed, and responsibility for administering the training program may vary with different industries, but basically there is little important difference. Although the conference method usually is most successful with small groups, a procedure which makes effective discussion possible even in large groups is the "Discussion 66" method described in Chapter III.

The conference method has been used successfully in executive training, in non-supervisory staff training, and

in sales training. Certain progressive trade unions have found the method effective in promoting interest and increased understanding in their educational programs.

The techniques which help to produce successful conferences were discussed in Chapter IV. The conference leader should possess much the same qualifications as any other good leader. He has certain duties and responsibilities which may be considered rather generally as: planning, conducting, evaluating, and reporting the conference. In planning the conference, the leader should prepare introductory remarks in which he defines the purpose or subject. He should prepare an outline which will help him to keep the discussion 'on the track'. He must not overlook such important features of the physical setting as proper seating, lighting, and temperature. In conducting the conference, the leader must guide the discussion and secure participation from the members. The attitude of the members is important because their experience and knowledge must furnish the basis for successful discussion.

The conference method has a definite place in Navy training. In formal training school, the conference may be used in at least three ways: as an administrative device, as an in-service training device, and as a teaching procedure. In both formal training activities and operating activities, the conference method can be used for training in those areas in which the members have some knowledge or experience.

Commissioned officers and petty officers can certainly be trained in certain areas using the conference: civilian personnel have been, and are being trained in this manner; and there is every reason to believe that non-rated personnel, if they have some knowledge or experience in the area of training, should be suitable trainees.

Whether the conference method should be used in training depends upon the content of the training course, the amount of time available, and the knowledge and experience of the members.

Finally, the conference method is based on psychologically sound principles. It has been successfully used in industrial training for almost thirty years. There is every reason to believe that it can and will be an effective device in producing more efficient learning in many of the areas and situations included in Navy Training.

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APPENDIX

APPENDIX

Analysis of the Conference Leader's Job

What the Leader Does	Devices He May Use
Presents the problem or topic.	1. Place the general purpose of the discussion before the group. 2. Suggest the importance of the problem. a. By reference to a previous discussion. b. By examples (if possible). 3. Define the terms that have been used so that there may be no confusion or misunderstanding. Avoid use of terms that are not generally used by the group.
Starts the discussion of the topic.	1. Ask an overhead question. Example: How many of you have had more than five years' experience as a foreman? 2. Raise debatable questions. 3. Cite a specific case for illustration. 4. Misstate opinions to provoke opposition.
Develops charts.	1. Enter appropriate headings. 2. Change headings to expand the discussion. 3. Add columns when needed (in an emergency).
Enters the selected points on the charts.	1. Select the essential points or facts that have been brought out in discussion and interpret them when necessary. 2. Summarize or brief the items for chart entry. 3. Eliminate the nonessential data. 4. Obtain general-group agreement before entering a chart item.
Guides the discussion.	1. Keep the discussion concrete; insist upon specific cases; avoid philosophizing. 2. Use overhead questions (to the group). 3. Ask leading questions. 4. Use direct questions (to an individual). 5. Illustrate points with sketches, diagrams, or stories. 6. Assist the members in expressing themselves.
Controls the discussion.	1. Accelerate the discussion. a. Bring out specific cases to provoke interest. b. Make negative statements. c. Start a friendly argument between two group members. d. Encourage some member of the group whose opinions are known to take issue with the previous statements. e. Take up an interesting side problem to revive the interest of the group. f. Call attention to the short time that remains g. Stand up if he is seated. 2. Slow up the discussion. a. Cite cases that illustrate points of view that have not been suggested. b. Tell some stories. c. Ask whether the group has considered all sides of the question. d. Summarize the opinions.

Analysis of the conference leader's job (continued)

What the Leader Does	Devices He May Use
Prevents "side-tracking."	1. Restate the original problem. 2. Ask what the point has to do with the problem. 3. Ask questions to bring the discussion back to the point. 4. Point to the item on the chart without speaking. 5. Secure a statement from a level-headed thinker in order to head off the "rambler." 6. Request the individual members to postpone the side issues until the main point has been settled.
Takes a "side-track" deliberately. a. When it is needed to revive interest. b. When the topic has been exhausted.	1. Recognize the worth-while side issues that have been brought up. 2. Recall the live topics that were suggested at earlier sessions. 3. Control the side-issue discussions to maintain their relationship to the original problem. 4. Return to the main problem after the "side-tracking." 5. Compliment the individual who caused the "side-track" and ask, "Where do we go from here?"
Deals with the individual members of the group.	1. Restrain the talkative person. a. Disregard him, and recognize another person. b. If he is bluffing, put him "on the spot" by asking questions that will reveal his weaknesses, but do not comment on them. c. Politely ask him to give the others an opportunity to express their views. 2. Encourage the silent, friendly person. a. Lead him into the discussion by a question that suggests the answer. b. Build confidence by protecting him through interpreting his statements so others will appreciate his opinion. c. Visit him at work. 3. Break the silence of the "I am against.." person. a. Find out what he is interested in. b. Get some member to "pick on" him. c. Cross him by a positive statement. 4. Use the person who actually knows and realizes he is the "last word." a. Give him opportunities to show his knowledge in order to keep him interested in giving to the group. b. Steal his "thunder" and give the credit to other members of the group. This quiets him when he becomes too dominating. c. If necessary trap him by asking some technical questions.

Analysis of the conference leader's job (continued)

What the Leader Does	Devices He May Use
Deals with the individual members of the group. (continued)	5. Temper the high-strung or touchy person. a. Display a helpful attitude. b. Come to his rescue in critical situations until he learns to give and take in a discussion. c. If necessary hold a private conference with him, and get him to see that it is a game of "give and take." d. Turn the situation into good fun.
Summarizes the discussion.	1. Review the high spots of the discussion, emphasizing those points in which the group members expressed particular interest. 2. Announce the topic for the next meeting.

PRESIDENT LACY 'carried the load' in answering numerous questions asked by our supervisory people, all of whom were invited to attend one of a dozen all-day meetings like this. The ten supervisors, *seated left center*, have come forward as secretary-spokesmen to ask the questions raised by their groups.





GROUPS like those pictured *above*, supervisors chose their chairmen and secretary-spokesmen and prepared questions, covering a wide range of Company activities, which were answered at the meetings.

INFORMATION PLEASES

BY JUD COOK

I HAVE BEEN a reporter from the age of 20. By journalistic measurements that is neither good nor bad but it should signify to most people that I have a lot of meetings and conferences under my worn belt. You can't avoid them; yet most of them you'd like to. You cover them when the boss tells you to; it's part of journalism's exciting life.

A few meetings I was eager to attend and there are still fewer that I recall with any singularity or lasting impressions. Three years ago there was one I very anxiously wanted to cover. You remember it. It was held aboard the battleship *Missouri*.

But I lost out on that one. I drew a short straw. As a consolation, though, I caught an assignment of a little lesser import. I was to eye-witness the official end of Sino-Japanese warfare on Chinese soil.

About that I recall the excited chattering of the little Jap generals and how one of them surrendered his army, scratching his signature with an American Parker 51 pen. Kind of a foolish thing to remember but it irked me when I thought about trying to buy one from a Chinese merchant in unoccupied China. Eighty-five Amelican dollas, missa!

Some things about a few conferences and meetings do stick and at the end of this story I'm going to tell you what, concerning the recent meetings held by our President Thomas N. Lacy, will remain in my mind for a long time.

With the Usual Apathy

I hasten to extend my apologies to Mr. Lacy for saying that I accepted the conference assignment with the usual amount of apathy. It was a meeting and, knowing nothing much about it then, it ignited no particular flame of interest.

People were already streaming into the Detroit Bell auditorium when I arrived so I stepped along faster. My first surprise about the meeting came before I got through the door. A charming girl held me back and said: "Here's your card, sir; write your name on it." Who in heck's fire would be interested in *my* name at a presidential conference, I couldn't imagine.

My second surprise followed quickly as I entered the auditorium. I could see that it was going to be a large meeting but, what's more, the 200 chairs in the auditorium were arranged in groups of six, very plainly separated. Was I supposed to have a reservation? I guessed not; others were choosing seats where they pleased. Up front I spotted a fellow, one of the first persons I met when I joined our Company not so long ago. I sat with him and soon we were joined by four others. We talked about the strange seating arrangement but we concluded with nothing beyond conjecture.

Seated before us up front were President Lacy and Ben R. Marsh, vice president and general manager. Mr. Marsh, acting as chairman for this portion of the meeting, rose and called the meeting to order. An old newspaper habit of checking the time of events made me look at my watch. It was 10.

Speaking into the microphone, Mr. Marsh told us that the purpose of this meeting and of all the other eleven meetings to be held in Detroit and outstate was to permit all of the management personnel of our Company—some 2,500—to obtain information about the state of the telephone business direct from Mr. Lacy.

I was momentarily disappointed. Sure enough, here it was again, another meeting listening to a string of facts and figures with the probability of interest about as high as a city assessment notice. But why was it necessary to seat people in groups to hear this?

Offer Wide Open

Mr. Marsh was continuing. The second objective of the meeting, he said, was to give every management employee an opportunity to obtain information about everything else relative to our business. Quite an offer, I thought. I took it with a grain of salt, certain that no supervisor was going to stick out his happy neck just to see if the offer was genuine.

But it was. It certainly was.

Mr. Marsh finished his opening remarks and then presented Mr. Lacy who went into detail about the kind of job telephone people have been doing and about the growth of the business compared to that of other large companies. Contrary to my expectation, facts and figures were interesting and they were made more so by being cast visually on a large screen—big, plain figures, and charts, made simple and easy to evaluate.

Mr. Marsh returned, picked up the thread of the story, and talked about our expansion during the past few years, about the construction program, and about how service has been maintained during these trying times. Mr. Lacy then reviewed revenues, expenses and earnings and gave us a high-

(Continued on next page)







THE PANEL, shown *above* seated behind Mr. Lacy, at the meeting described here: H. F. Lange, R. E. Driver, R. J. McElroy, P. B. Hatcher and J. B. Kaler. *Below:* W. C. Patterson, *left*, and Ben R. Marsh.

Information Pleases

(Continued from preceding page)

spot picture of the progress of our Company's rate case and of other rate case situations throughout the Bell System.

I was glad to have one of the little booklets that were passed out. They contained the charts Mr. Lacy and Mr. Marsh had shown. I felt much closer to the situation and I honestly began to feel more comfortable with my name emblazoned on my coat lapel. At first, I was convinced it was blinking on and off like a neon sign.

Mystery Clears

Near noon Mr. Marsh presented W. C. Patterson, vice president—public relations, as chairman for the remainder of the day. Bad as I am with figures, it was easy to get four out of putting two and two together after Mr. Patterson's first few remarks. The mystery about the clustered groups began to clear up.

"As Mr. Marsh has told you, the balance of this meeting today is going to consist of a different kind of group discussion—a different kind of question and answer period—different than we have ever used before in company meetings. Here we are today with some 250 people in this room—a pretty big meeting!

"Certainly in a group the size of this, a lot of questions must have occurred to you—a lot of things that weren't quite clear—or a lot of things you would like to know about that were not covered in the material presented.

"Now if I were to ask for questions in the usual manner . . . you know what would happen. There would be a period of silence while everyone waited for someone else to ask a question. Finally some brave soul would ask a question—just to help the chairman out. It would probably be a question to which he knew the answer. He would want to play safe and not 'stick out his neck.'

Unique Characteristics

"That's a common characteristic of all big meetings and it is to meet just such a situation that the extension division of Michigan State College developed the process we're going to use today. . . . It has two unique characteristics. In the first place, regardless of the size of the audience every individual in it has a chance to participate in developing questions or ideas. Aside from that very democratic characteristic, the individual remains almost entirely anonymous because the balance of the people in the auditorium don't know who originated any particular question.

"Now, let me describe to you very quickly how the 'on-the-spot' committee process works. The chairs have been arranged in rows of three so that we can easily form 'on-the-spot' committees of six people—three chairs in the front row and three behind them. Each group is going to select a chairman whose job it will be to encourage everyone in the group to contribute his ideas. Each group will select a secretary-spokesman who will record the questions that are suggested and later will be the one who asks those questions. After that is done, each group will have time to develop its questions and to select the first and second choices of the questions developed in that group. Finally, the secretary-spokesmen will come up to the microphone here on my right and ask the questions for their groups and Mr. Lacy and the other men here will try to answer those questions." (The "other" men besides Mr. Lacy and Mr. Marsh were R. E. Driver, comptroller, and division superintendents who had formed themselves into a "panel" to answer questions.)

The question-and-answer method Mr. Patterson described was developed by Mr. J. Donald Phillips, assistant director of continuing education at Michigan State College. He calls it the "66" method from the fact there are six members of the committee and they are allowed six minutes to develop their questions.

The business of electing chairmen and secretary-spokesmen was completed rather quickly and before many questions could be introduced, it was time to knock off for lunch.

Like Political Caucus

Whatever it was he ate, it seemed like each one in the audience ate the same thing because the degree of stimulation in each appeared alike. It wasn't so, of course, but I sensed that the 200 to 250 supervisors huddled together somewhere during the lunch period and pledged themselves to really pin top management down. This was a meeting full of surprises and here was another in that its atmosphere was more like an avid political caucus than a meeting of supervisors and top management.

About the Author . . .

Jud Cook, 31-year-old staff writer for THE MICHIGAN BELL, is a native Detroiter. He was the sports correspondent of his high school for the Detroit Free Press, a job which led to staff reporter for that paper.

In World War II, he roamed about the Far East, Africa and the Caribbean as a GI war correspondent looking for stories for Yank Magazine, the Army weekly. Some he found, others slipped away faster than airplanes, jeeps, or mules could chase them. Some of those he did cover, though, have appeared in national magazines through the courtesy of Yank.

Among his "firsts" Cook can claim being the first American war correspondent to enter the unexplored regions of Northern China, territory inhabited by the tribal, gun-loving Lolos. "That's also among my 'lasts,'" Cook promises. "It meant 11 days on horseback. I can still stir up a genuine case of lumbago just thinking about it."

With a renewed after-lunch vigor the interrogation started and questions popped all around like bubbles in the sun. Anybody can call these meetings what he pleases, "on-the-spot," "66," or what, but I believe I shall always remember this particular one as the "on-the-carpet" conference. I do not mean to intimate that management was "on the carpet" in a defensive sense at all. There were lucid, logical answers to most questions. Some may have considered a few questions not answered fully enough, nevertheless you could feel an unmistakable sincerity about giving all the information at hand.

Just as surely as I sit here, some readers will accuse me of propagandizing. Let them. I'm sure at least 2,500 people will share my opinion and my belief is that a lot of unfounded fears about big business being a sinister monster would be dispelled quickly by witnessing just one demonstration like this.

Wealth of Information

I had heard that Mr. Lacy carried in his head a wealth of information about our Company but I was truly amazed at the simplicity, the forthrightness of his answers. Seldom did he refer to statistics he had in his binder. Mr. Marsh and Mr. Driver were equally prolific and you couldn't escape a sense of confidence in those in command. There were no holds barred; and when you ask a man to deliberately plant one on your schnozz, you're pretty confident in the durability of it.

By later afternoon the seats were getting harder but the flow of questions and the panel's eagerness to answer them kept interest at a high pitch. H. F. Lange, vice president—personnel, joined the panel when questions concerning the material presented by Mr. Lacy and Mr. Marsh were exhausted and the meeting was thrown open to questions pertaining to other phases of our business. He received a barrage of personnel questions. Mr. Patterson, too, came in for several turns as a member of the panel whenever a question on public relations arose.

The meeting wound up at about 4:30 with a few closing remarks by Mr. Lacy and Mr. Marsh. As we left the auditorium my friend said to me, "well, they certainly asked every conceivable question, didn't they?" Yes they did. Questions ranged from party-lines to pensions, rest rooms to raises, and cafeterias to cutovers, but I don't think I answered my friend's remark at the moment.

A Vivid Picture

I walked out of one of the few meetings that will leave an impression. I didn't answer my friend because I was thinking and convincing myself of the undeniable connection between the meeting three years ago that I didn't cover because I drew the short straw and this meeting. Thoughts about that silly fountain pen came back to me. I still had a vivid picture of Mr. Lacy and the panel bobbing up and down, striding to and from the microphones. And with that picture came thoughts about such things as iron curtains. It made me think but I don't remember saying a word to anyone until I got home and my wife asked me what I was doing with that bell-shaped card on my coat lapel.

INFORMATION PLEASES

BY JUD COOK

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